**Rel: 1.13 - 12/2012**

# User Manual

## MDLsolutions – Dialer/Predictive Dialer, Supervisor/Call Center Manager Dashboard and Agent Interface – Version 2.

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# ***Getting Started/Important Links***

## Quick Start

To get your Predictive Dialer/Dialer configured quickly, go to our online FAQ's at http://www.mdlsolutions.com/DialerFAQ.aspx.
Select the FAQ that best describes what you are trying to do, and then use this user manual as an additional reference.

If you run into an issue, please look over our online forum for additional help http://www.mdlsolutions.com/Forums.

## Important Links

Setup the Predictive Dialer to work with 3CX:
http://www.mdlsolutions.com/DialThrough3CX.aspx

Setup and play recorded messages with the dialer:
http://www.mdlsolutions.com/DialerPlayPrompt.aspx

Install 3CX plug-in:
http://www.mdlsolutions.com/PlugIn.aspx

Install Agent Interface:
http://www.mdlsolutions.com/AgentDisposition.aspx

Dealing with errors:
http://www.mdlsolutions.com/ErrorHelp.aspx

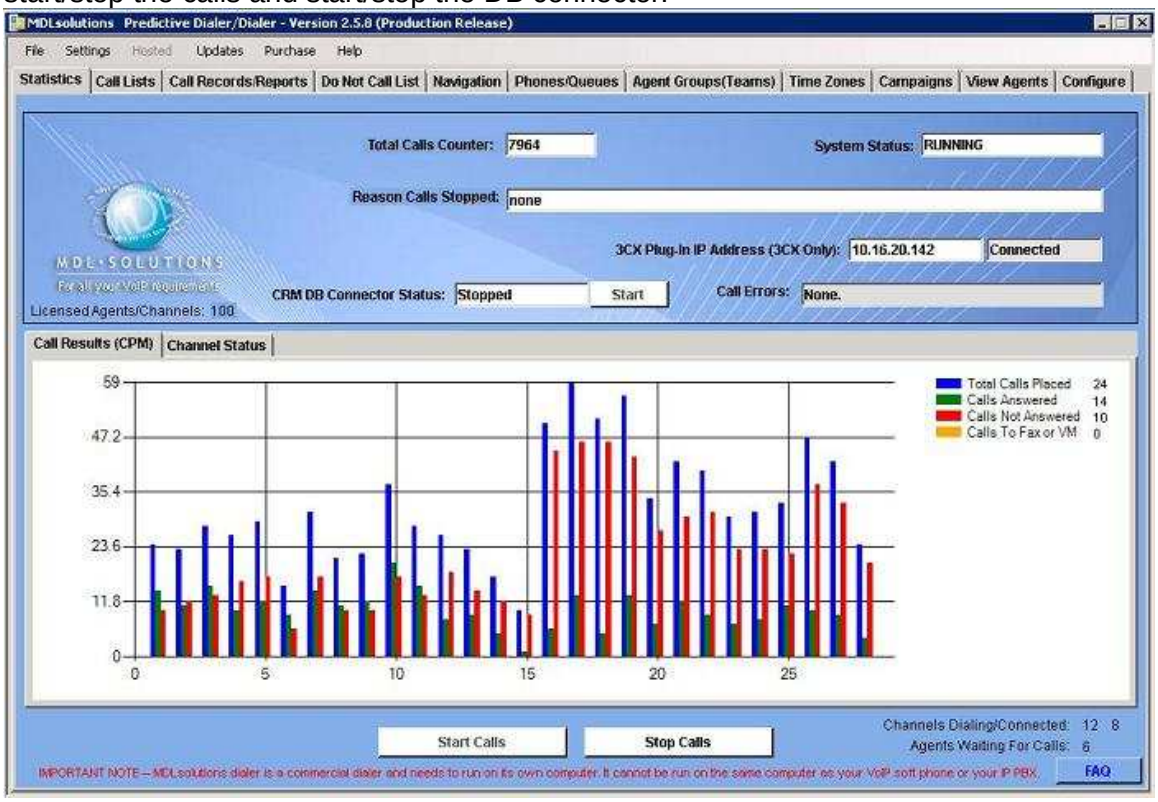
Information on importing records into the MDLsolutions Dialer/Predictive Dialer.
http://www.mdlsolutions.com/manuals/ImportingRecordsDialerPredictiveDialer.pdf

# ***Predictive Dialer/Dialer***

## Statistic/Performance Monitoring

**(See Call Center Dashboard for additional performance graphs/analytics)**

The Statistics tab gives the Dialer/Predictive Dialer administrator a general overview of how the Dialer/Predictive Dialer is progressing. It also allows the administrator to start/stop the calls and start/stop the DB connector.


MDLsolutions Predictive Dialer/Dialer - Version 2.5.8 (Production Release)
File Settings Hosted Updates Purchase Help
Statistics Call Lists Call Records/Reports Do Not Call List Navigation Phones/Queues Agent Groups(Teams) Time Zones Campaigns View Agents Configure
Total Calls Counter: 7964
System Status: RUNNING
Reason Calls Stopped: none
3CX Plug-In IP Address (3CX Only): 10.16.20.142
Connected
MDL·SOLUTIONS
For all Your VoIP Requirements
CRM DB Connector Status: Stopped
Start
Call Errors: None.
Licensed Agents/Channels: 100
Call Results (CPM)
Channel Status
59
47.2
35.4
23.6
11.8
0
0
5
10
15
20
25
Total Calls Placed 24
Calls Answered 14
Calls Not Answered 10
Calls To Fax or VM 0
Start Calls
Stop Calls
Channels Dialing/Connected: 12 8
Agents Waiting For Calls: 6
IMPORTANT NOTE – MDLsolutions dialer is a commercial dialer and needs to run on its own computer. It cannot be run on the same computer as your VoIP soft phone or your IP PBX.
FAQ

**Total Call Counter:** Total calls placed in all call lists.
**System Status:** The system status RUNNING, STOPPED and COMPLETING.
**Reasons Calls Stopped:** States the reason the system stopped, for example, user input or error.
**3CX Controller IP Address (3CX Only):** The IP address of the 3CX IP PBX, that is set under the "Configuration File" (Menu items: File/Configuration File) settings.
**CRM DB Connector Status:** The status of the CRM DB connector and the ability to start and stop the CRM DB Connector.
**Call Errors:** Any SIP call errors produced while calls are being made.
**Start Calls:** Starts placing calls.
**Stop Calls:** Stops calls being placed, user needs to wait until all calls stop normally, after clicking this button.
**FAQ:** Click to check the online FAQ's for help.

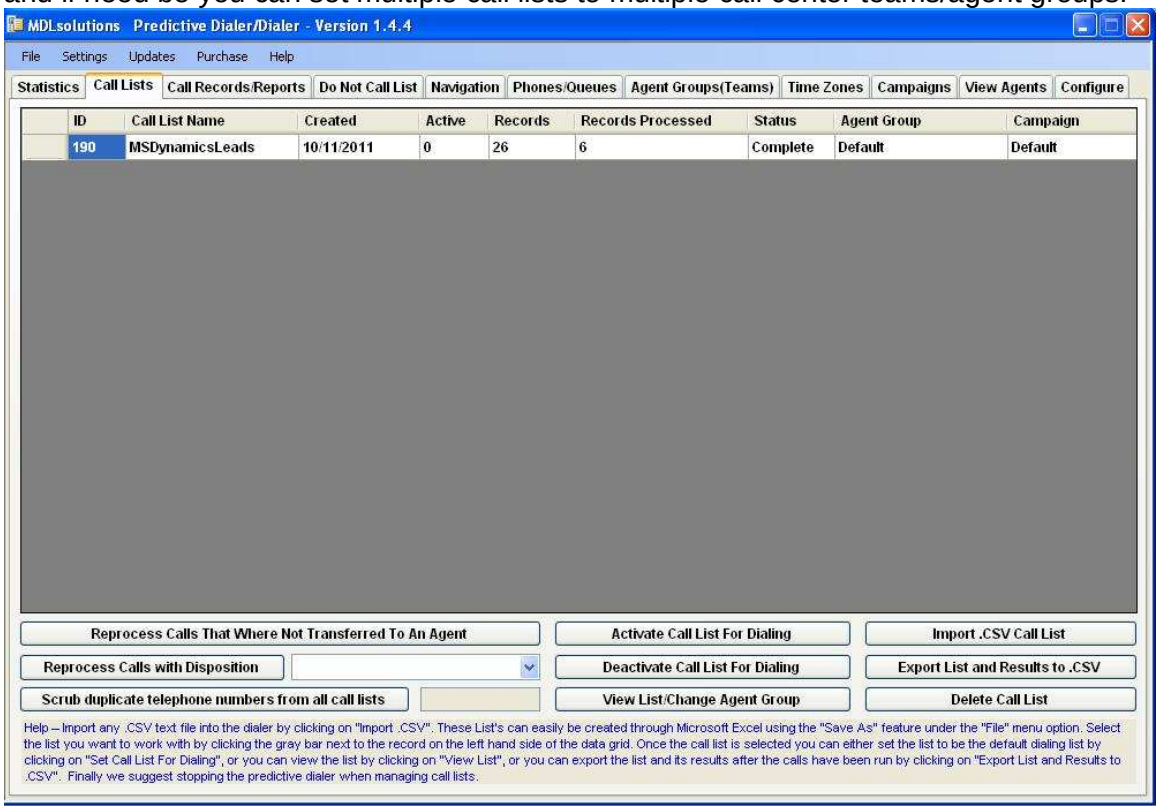
**Performance Graph**
Blue = Total calls placed.
Green = Calls answered.
Red = Calls not answered.
Yellow = Calls answered by a fax machine or by an answering machine/voice mail.

**Real-time Agent/Channel Information (bottom right)**
Channels Dialing/Connected = Total amount of channels simultaneously dialing and the total amount of calls currently connected. Currently connected indicator only applies to Bridge Mode.
Agents Waiting For Calls = The total amount of agents waiting for new calls.

**Channel Grid**
“Channel ID” = Numeric id of channel.
“Record ID” = The database record “ID” that is being processed.
“Number” = The telephone number being dialed by the Dialer/Predictive Dialer.
“Enquiries” = Reserved.
“Call Status” = The current status of the call, for example connected, transferred, disconnected and idle.
“Action Info” = The user inputted action/keyword text info that relates to the actual action being processed.

## Call Lists

The Call Lists tab is used to upload and manage your imported call lists. Currently only comma delimited text files can be imported. Multiple call lists can be run simultaneously and if need be you can set multiple call lists to multiple call center teams/agent groups.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ID
Call List Name
Created
Active
Records
Records Processed
Status
Agent Group
Campaign
190
MSDynamicsLeads
10/11/2011
0
26
6
Complete
Default
Default
Reprocess Calls That Where Not Transferred To An Agent
Activate Call List For Dialing
Import .CSV Call List
Reprocess Calls with Disposition
Deactivate Call List For Dialing
Export List and Results to .CSV
Scrub duplicate telephone numbers from all call lists
View List/Change Agent Group
Delete Call List
Help – Import any .CSV text file into the dialer by clicking on "Import .CSV". These List's can easily be created through Microsoft Excel using the "Save As" feature under the "File" menu option. Select the list you want to work with by clicking the gray bar next to the record on the left hand side of the data grid. Once the call list is selected you can either set the list to be the default dialing list by clicking on "Set Call List For Dialing", or you can view the list by clicking on "View List", or you can export the list and its results after the calls have been run by clicking on "Export List and Results to .CSV". Finally we suggest stopping the predictive dialer when managing call lists.

**Reprocess Calls That Where Not Transferred To An Agent:** Reprocess all calls that where not transferred to an agent.
**Reprocess Calls with Disposition:** Reprocess calls that have a certain disposition.
**Scrub duplicate telephone numbers from all call lists:** Scrubs duplicate telephone numbers from all call lists.
**Activate Call Lists For Dialing:** Activate the selected call list for dialing.
**Deactivate Call Lists For Dialing:** Deactivate the selected call list, so it is no longer dialed.

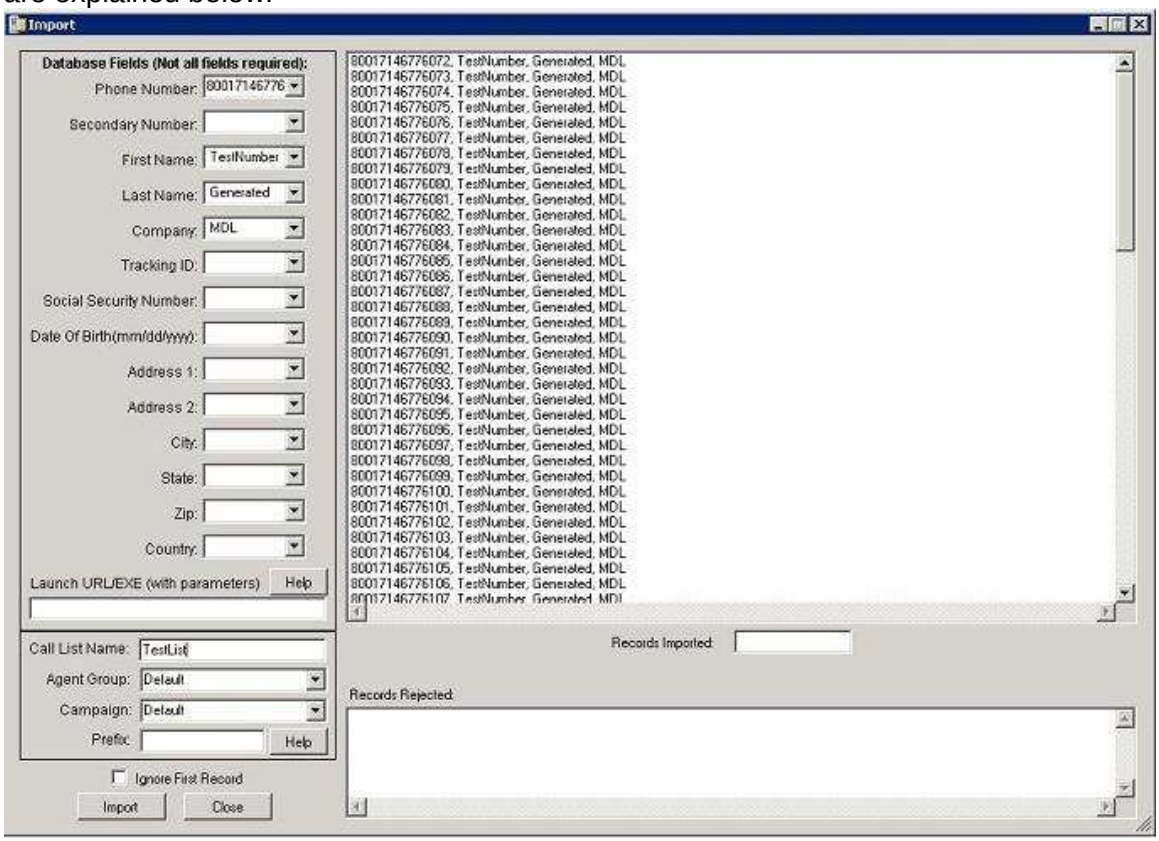
**View List/Change Agent Group:** View the selected call list details and if need be change the “Agent Group/Call Center Team” for the call list.
**Import .CSV Call List:** Import comma delimited text file.
**Export List and Results to .CSV:** Export a call list and it’s results to a .CSV file.
**Delete Call List:** Delete selected call list.

**CALL LIST GRID**

“ID”= Record id.
“Call List Name”= Name of the call list.
“Created”= Date the list was imported.
“Active”= If the list is activated for dialing.
“Records”= The number of records in the call list.
“Records Processed”= The number of records processed in the call list.
“Status”= If the list is active, deactivated or complete.
“Agent Group”= The agent group/call center team that the call will be transferred to, for this call list.
“Campaign”= The campaign associated with the call list.

## Import Call Lists

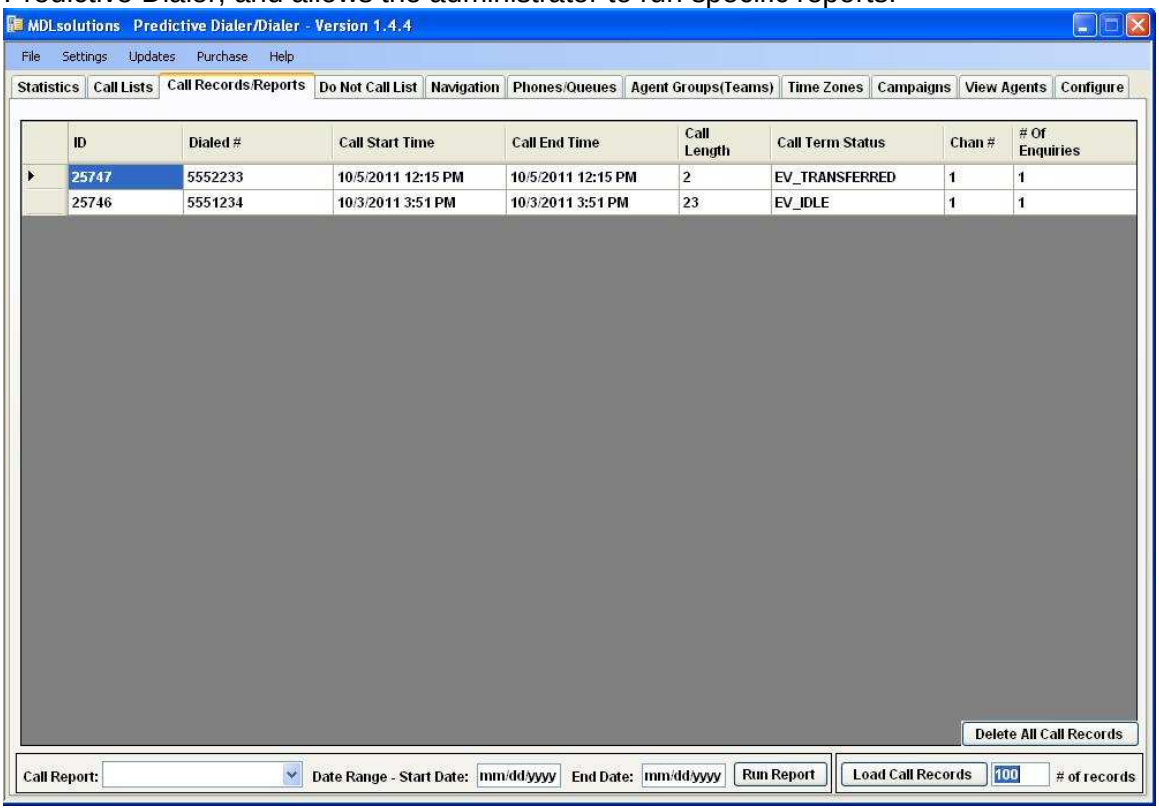
Start by mapping the data from the comma delimited text file to the Dialer/Predictive Dialer columns. Then set the “Call List Name” the “Agent Group” and “Campaign”, that you created or just use the defaults for “Agent Group” and “Campaign”. Optional fields are explained below.




**Call List Name:** Any call list name you like that is shorter than 40 characters and contains no numeric characters.
**Website URL/ Application EXE (supports parameters)(optional):** If you require a website/application to be automatically launched when a call is transferred to an agent, then please set the website URL here and use the “Help” button to see what parameters you can pass to the website URL.
**Prefix(optional):** If your outbound rules in 3CX, require you to use a prefix to dial out of a certain VoIP provider/PSTN provider, then you can insert that prefix here.
**Ignore First Records:** Ignores the first record in the imported comma delimited text file, as this is sometimes the row that contains the column headings.
**Records Imported/Records Rejected:** Total records imported into the Dialer/Predictive Dialer and any records that did not meat the import filter/s criteria.

## Call Records Reports

The Call Records/Reports tab displays all the calls that have been made by the Predictive Dialer, and allows the administrator to run specific reports.

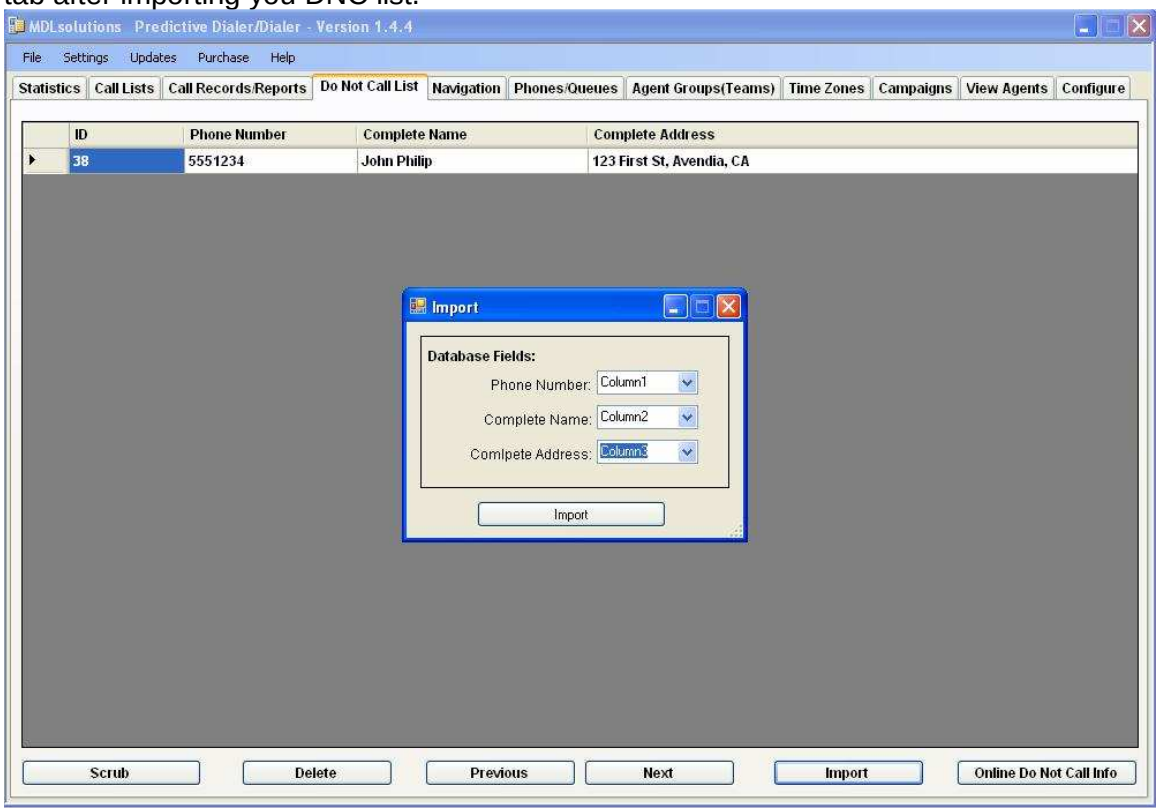



**Call Report:** The type of report the administrator can run.
**Date Range:** The Start and End date range.
**Run Report:** Click Run Report once you have selected the report (Call Report) and set the Start and End date range.
**Load Call Records:** Input the amount of call records you want displayed, and then click on Load Call Records.
**Delete All Call Records:** Completely delete all call records. Call records are automatically deleted after 7 days, but this can be changed in the dialer config file.

**Call Record Grid:**
ID: Record id.
Dialed #: Number that is dialed.
Call Start Time: The time the call started.
Call End Time: The time the call ended.
Call Length: The length of the call in seconds. This will be set if the Agent uses the Agent Interface.
Call Term Status: What was the status of the call, idle (no answer/disconnected) or transferred (to an agent).
Chan #: The Predictive Dialer channel the call is placed on.
# Of Enquiries: N/A.

## Do Not Call List

If you want to scrub your call lists against the “Do Not Call List” that your country / state / province provides, then load your call list first, and then click on the Scrub button on this tab after importing you DNC list.



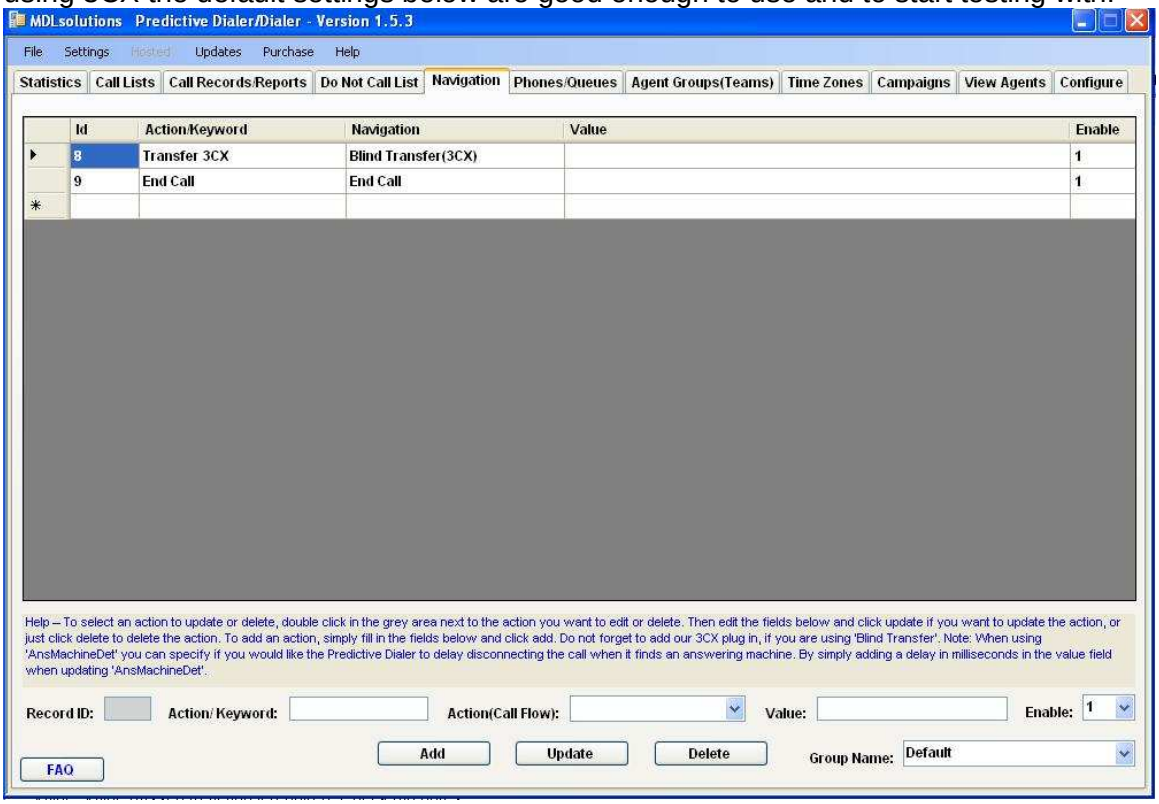

**Scrub:** Deletes all records that have matching phone numbers in your call lists.
**Delete:** Delete all Do Not Call records.
**Previous:** Moves to previous record.
**Next:** Moves to next record.
**Import:** Imports call records from .CSV (comma delimited) text files only, can easily be created using Microsoft Excel or Microsoft Access.

**Online Do Not Call Info:** A site where you can learn how to obtain a US “do not call list”.

**Call Record Grid:**
ID: Record id.
Phone Number: Phone number to be scrubbed from the call list records.
Complete Name: The name that is related to the phone number.
Complete Address: The address that is related to the phone number.

## Navigation

The actions below will determine what will happen to the call once connected. When using 3CX the default settings below are good enough to use and to start testing with.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Time Zones
Campaigns
View Agents
Configure
Id
Action/Keyword
Navigation
Value
Enable
8
Transfer 3CX
Blind Transfer(3CX)
1
9
End Call
End Call
1
Help – To select an action to update or delete, double click in the grey area next to the action you want to edit or delete. Then edit the fields below and click update if you want to update the action, or just click delete to delete the action. To add an action, simply fill in the fields below and click add. Do not forget to add our 3CX plug in, if you are using 'Blind Transfer'. Note: When using 'AnsMachineDet' you can specify if you would like the Predictive Dialer to delay disconnecting the call when it finds an answering machine. By simply adding a delay in milliseconds in the value field when updating 'AnsMachineDet'.
Record ID:
Action/ Keyword:
Action(Call Flow):
Value:
Enable:
1
FAQ
Add
Update
Delete
Group Name:
Default

**Record ID:** The action record id.
**Action/Keyword:** The unique identifier used when adding an action.
**Action(Call Flow):** The actual call flow action that is performed, once the call is made.

**Options:**

**AnsMachineDet**: If an answering machine is detected, the dialer hangs up, if not, it continues to next action.

**AnsMachineDetMessage**: If an answering machine is detected, then it leaves a message, if not, it continues to next action.

**Blind Transfer(3CX)**: Will transfer the call to an agent in a 3CX queue, defined under the “Phone/Queues” tab on the Predictive Dialer.

**Bridge Transfer(3CX)**: Used when calls are not transferred through 3CX, but directly to the VoIP provider/gateway. Normally used in large scale call centers.

**Transfer:** Transfer the dialer call, to the next available extension in the extension list “Phone System Transfer List”.

**On # Go Back Steps**: If the person being called, press’s # during a PlayPromptSurvey action, the Dialer/Predictive Dialer will go back the amount of steps/actions defined in the “Value” field..

**PlayPrompt:** Plays a voice prompt Wave file (64 kbps, 8 bit, mono, 8khz). All wave files must be placed in the "Prompts" directory in the Dialer's main directory.

1.Select the second record in the list 'Blind Transfer(3CX)'.

2.Change the "Action" to "Play Prompt" and the "Value" to "welcome.wav". Welcome.wav is a test play prompt that is included with the installation, click "Update". To add your own prompt, create a prompt in the following format "Wave file (64 kbps, 8 bit, mono, 8khz, CCITT-U-LAW)" and copy it into the "Prompts" directory, that is located in the dialer's application directory, and simply change the "Value" to your new prompt name under the "Play Prompt" action.

3.To convert your wave/audio file:

Use Windows Sound Recorded to convert your files.

(a): Launch Sound Recorder in Windows XP (Start/All Programs/Accessories/Entertainment/Sound Recorder).

(b): Select File/Open select audio file to open.

(c): Select File/Properties/Convert Now.

(d): You need to select 8.000 kHz, 8 Bit, Mono CCITT u-Law

Format: CCITT u-Law

Attributes: 8.000 kHz, 8 Bit, Mono

(e). Click OK, click OK again, and then click File/Save.

(f). Check the file format by right clicking on it, properties/summary.

4.Upload your call list, by clicking on the 'Call List' tab on the dialer.

5.The prompt will now be played when you start the dialer.

NOTE: When using 'Play Prompt Get Key' under the 'Navigation' tab, make sure you include/enable 'AnsMachineDet' before using 'Play Prompt Get Key'.

**PlayPromptSurvey:** Will play a prompt as described in the "PlayPrompt" action, and will store any key that is pressed by the person dialed, in the SurveyOptions field in the Dialer/Predictive Dialer database. This Survey Option can be exported along with the call list at anytime using the "Call List" tab on the Dialer/Predictive Dialer or Call Center Manager Dashboard. The "PlayPromptSurvey" action also accepts # to repeat the prompt or previous steps using the "On # Go Back Steps" action and accepts 0 to transfer to an operator by using the "Blind Transfer(3CX)" action after the "PlayPromptSurvey" action.

**Play Prompt Get Key:** Will play a prompt as described in the "PlayPrompt" action, after the Dialer/Predictive Dialer receives a key input from the person dialed, the Dialer/Predictive Dialer will then move to the next action.

**Play TTS:** Will play any text in the "Value" field up to 512 characters, to the person dialed. If you want to play information from an imported call list/database field, then simply wrap the database field in "F()" and the Dialer/Predictive Dialer will know what to do. Example: F(FirstName). Remember to remove spaces from the call list descriptions, when using them in the F() wrap.

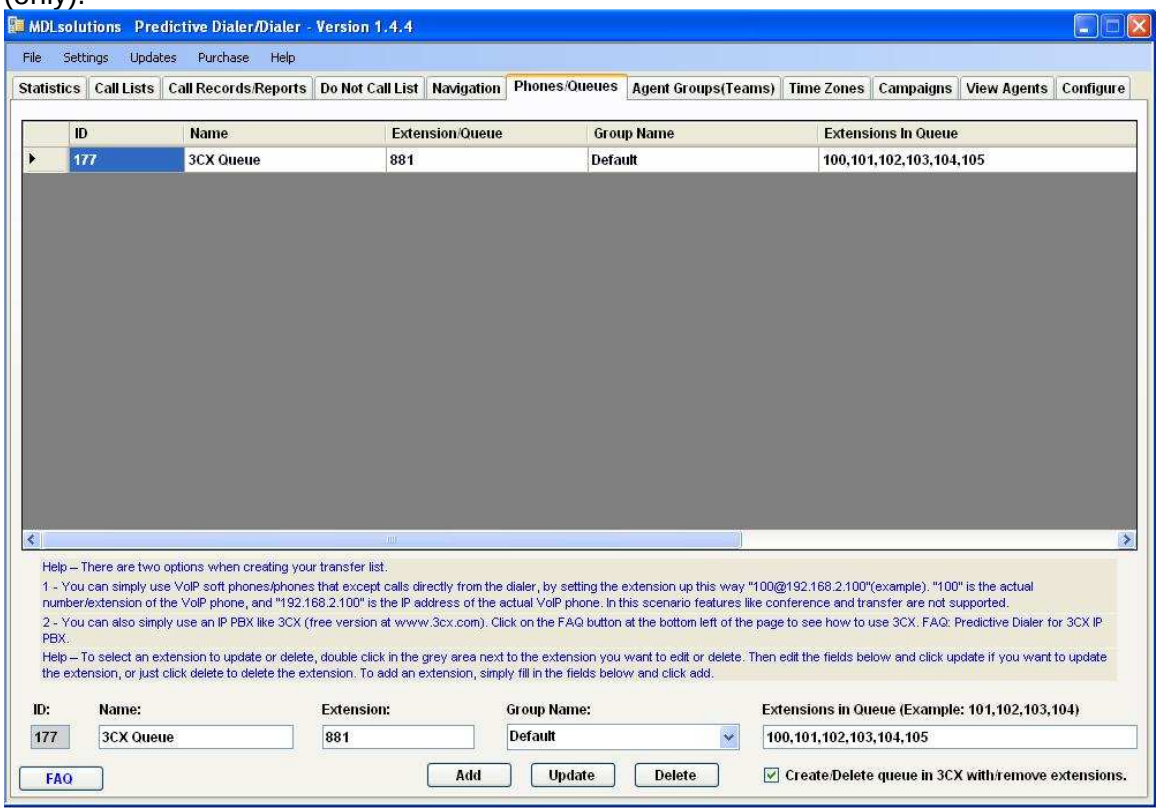
**End Call:** Ends the dialed call.

**Value: (Optional)**The value that is passed to the action. Check tab notes.
**Enable:** Allows the administrator to enable or disable an action.
**Group Name:** This allows you to assign a unique set of call flow actions to individual call lists, using a pre defined amount of channels that you need to define under the “Agent Groups (Teams)” tab.
**Add:** Add new action.
**Update:** Update selected action.
**Delete:** Delete selected action.

**Navigation Grid:**
Id: Action record id
Action/Keyword: The unique keyword the administrator uses to identify an action.
Navigation: The action/s you selected for your calls to follow once the call is connected.
Value: Value passed to action if required. Check tab notes.
Enable: If the action is enabled or disabled.

## Phones/Queues

The 3CX queue (and set of extension/s), or extension/s that the administrator wants the calls transferred to. When using 3CX, all calls must be transferred to a 3CX queue (only).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Statistics Call Lists Call Records/Reports Do Not Call List Navigation Phones/Queues Agent Groups(Teams) Time Zones Campaigns View Agents Configure
ID Name Extension/Queue Group Name Extensions In Queue
177 3CX Queue 881 Default 100,101,102,103,104,105
Help – There are two options when creating your transfer list.
1 - You can simply use VoIP soft phones/phones that except calls directly from the dialer, by setting the extension up this way "100@192.168.2.100"(example). "100" is the actual number/extension of the VoIP phone, and "192.168.2.100" is the IP address of the actual VoIP phone. In this scenario features like conference and transfer are not supported.
2 - You can also simply use an IP PBX like 3CX (free version at www.3cx.com). Click on the FAQ button at the bottom left of the page to see how to use 3CX. FAQ: Predictive Dialer for 3CX IP PBX.
Help – To select an extension to update or delete, double click in the grey area next to the extension you want to edit or delete. Then edit the fields below and click update if you want to update the extension, or just click delete to delete the extension. To add an extension, simply fill in the fields below and click add.
ID: Name: Extension: Group Name: Extensions in Queue (Example: 101,102,103,104)
177 3CX Queue 881 Default 100,101,102,103,104,105
FAQ Add Update Delete Create/Delete queue in 3CX with/remove extensions.

**ID:** Record ID.
**Name:** The name of the 3CX queue or name of the person using the extension.
**Extension:** Extension number of the 3CX queue or call center employee's extension.
**Group Name:** The group of Agents/Call Center team that you want the calls transferred to.
**Extensions in Queue:** The extensions you want to add to the 3CX queue.

**Help:**

(a) Create a 3CX queue name and extension number, to the 'Phones/Queues' list as shown below. Leave the 'Group Name' as default, unless you have setup individual call center groups/teams. Add all the agent extension numbers that the calls will be transferred to by the Predictive Dialer.

(b) Should you need to send calls in one call list to one group of agents, and calls in another call list to another group of agents, then please look over the 'Agent Group Setup' on Page 34. Otherwise for testing purposes just select default.

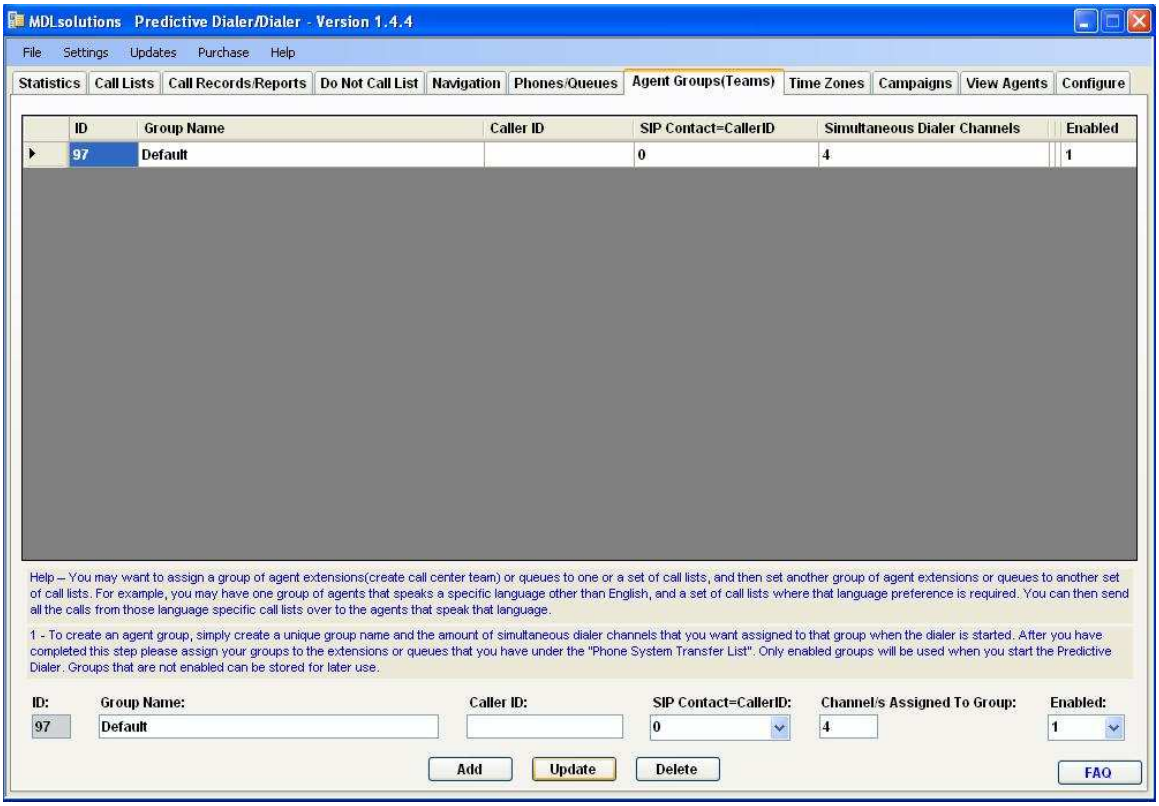
**Create/Delete queue in 3CX with/remove extensions:** Leave checked if you want the Predictive Dialer to create the queue and extension/s in 3CX for you.
**Add:** Adds a new queue or extension.
**Update:** Updates selected queue or extension.
**Delete:** Delete selected queue or extension.

**Phone System Transfer List Grid:**
ID: Record id.
Name: The name of the call center employee or 3CX Queue name.
Extension: Extension of the call center employees phone or extension number of the 3CX queue, that the calls are sent to.
Group Name: Call center agents group/call center team.
Extension in Queue: Extensions in the 3CX queue.

## Agent Groups(Teams)

The administrator will only need to create a separate agent group if multiple calls lists need to be run at the same time and transferred to different sets of extensions/3CX queues, commonly known as call center teams or agent groups. If this is not required just leave the default settings.

Example: If you have 4 agents that will work with English calls and 4 agents that will work with Spanish calls, and you have an English call list and Spanish call list, then you can create 2 agent groups/call center teams. You can simply do this by adding one agent group record with 4 “Simultaneous Dialer Channels” and name it English Team and add another agent group record with 4 “Simultaneous Dialer Channels” and name it Spanish Team. Remember to make sure you enable both agent group records.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Configure
ID
Group Name
Caller ID
SIP Contact=CallerID
Simultaneous Dialer Channels
Enabled
97
Default
0
4
1
Help – You may want to assign a group of agent extensions(create call center team) or queues to one or a set of call lists, and then set another group of agent extensions or queues to another set of call lists. For example, you may have one group of agents that speaks a specific language other than English, and a set of call lists where that language preference is required. You can then send all the calls from those language specific call lists over to the agents that speak that language.
1 - To create an agent group, simply create a unique group name and the amount of simultaneous dialer channels that you want assigned to that group when the dialer is started. After you have completed this step please assign your groups to the extensions or queues that you have under the "Phone System Transfer List". Only enabled groups will be used when you start the Predictive Dialer. Groups that are not enabled can be stored for later use.
ID:
Group Name:
Caller ID:
SIP Contact=CallerID:
Channels Assigned To Group:
Enabled:
97
Default
0
4
1
Add
Update
Delete
FAQ

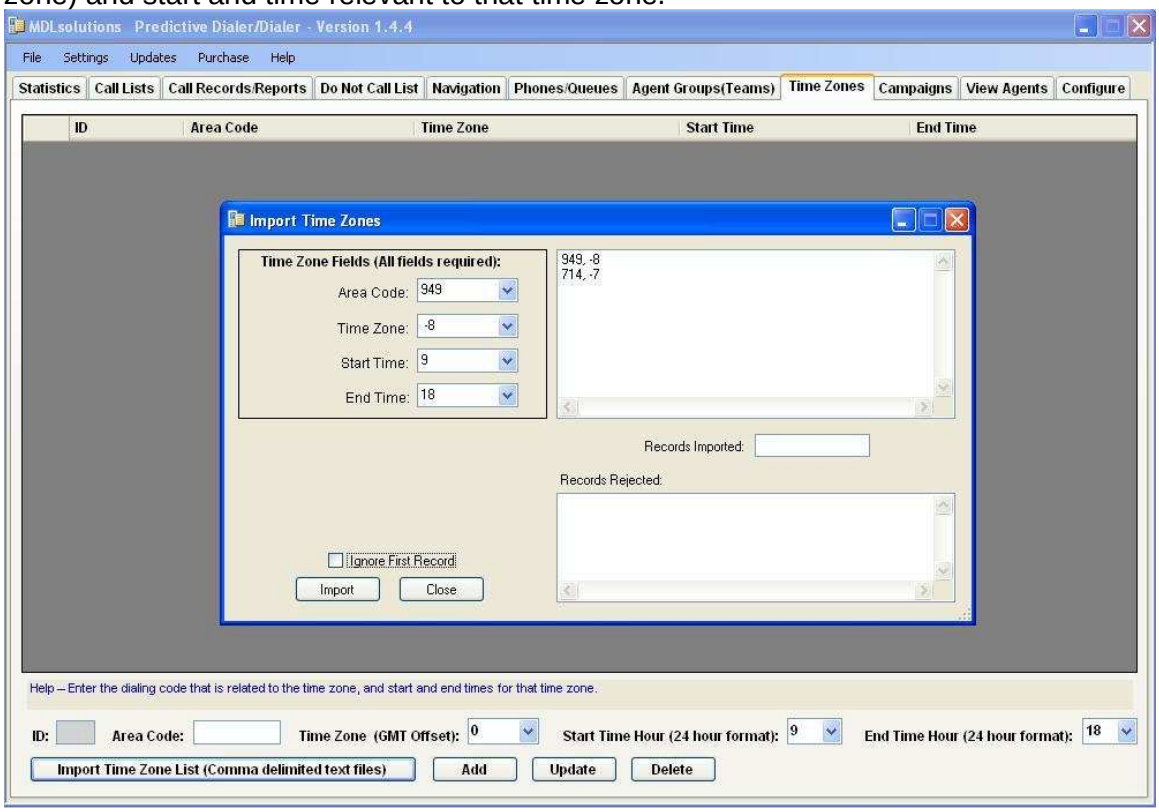
**ID:** Record ID.
**Group Name:** The name of the agent group/call center team.
**Caller ID:** If supported by VoIP or PSTN provider, this will be the caller id that will be shown on the receivers phone when calls are placed.
**SIP Contact=CallerID:** Reserved.
**Simultaneous Dialer Channels:** The amount of Predictive Dialer channels you want to set to the agent group/call center team. We recommend you assign at least one channel per agent.

**Enable:** Allows the administrator to enable or disable an agent group.
**Add:** Adds a new agent group.
**Update:** Updates selected agent group.
**Delete:** Delete selected agent group.

**Agent Group(Call Center Teams) List Grid:**
ID: Record id.
Group Name: The name of the agent group/call center team used in the "Phones/Queues" and "Call Lists".
Caller ID: The caller id for the agent group/call center team.
SIP Contact=Caller ID: Reserved.
Channels Assigned To Group: Amount of simultaneous channels assigned to the agent group/call center team.
Enabled: Allows the administrator to enable or disable an agent group/call center team.

## Time Zones

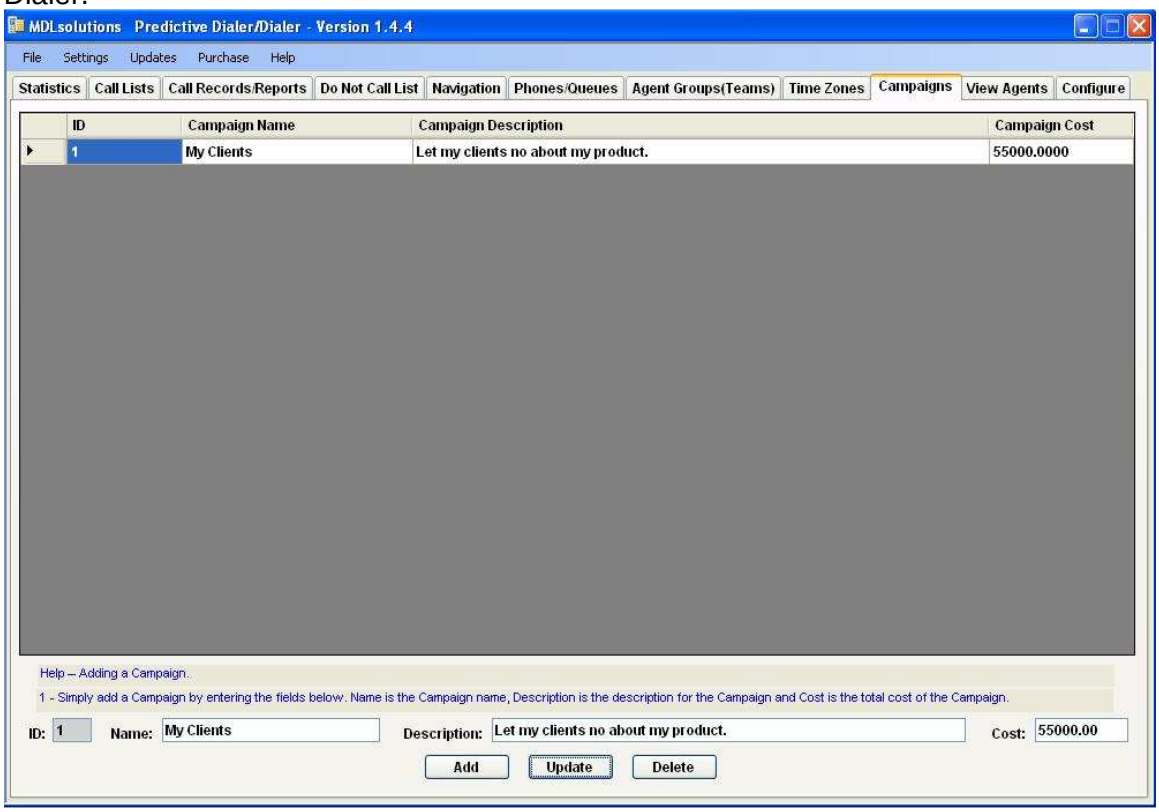
Time zones are used when calling different states, provinces and countries from your own that have different time zones. Time zones are simply managed by entering the dialing code for that state, province or country, and then entering the GMT offset (time zone) and start and time relevant to that time zone.




**ID:** Record ID.
**Area Code:** The are code of the actual city, state, province, country you are dialing. Example: If you are calling Santa Ana, California from the East Coast of USA, then the prefix would be 1714. From another country is may be 001714, check your country requirements online to be sure.
**Time Zones (GMT Offset):** This is the GMT offset that applies to the city, state, province and country you are calling. Check online for this information.
**Start Time Hour (24 hour format):** The call start time relevant to the above GMT offset.
**End Time Hour (24 hour format):** The call end time relevant to the above GMT offset.
**Add:** Adds a new time zone.
**Update:** Updates selected time zone.
**Delete:** Delete selected time zone.
**Import:** Import your own time zone list. These can be purchased online, and require the dialing code and GMT offset to be included in the list as shown in the screen shot above.

## Campaigns

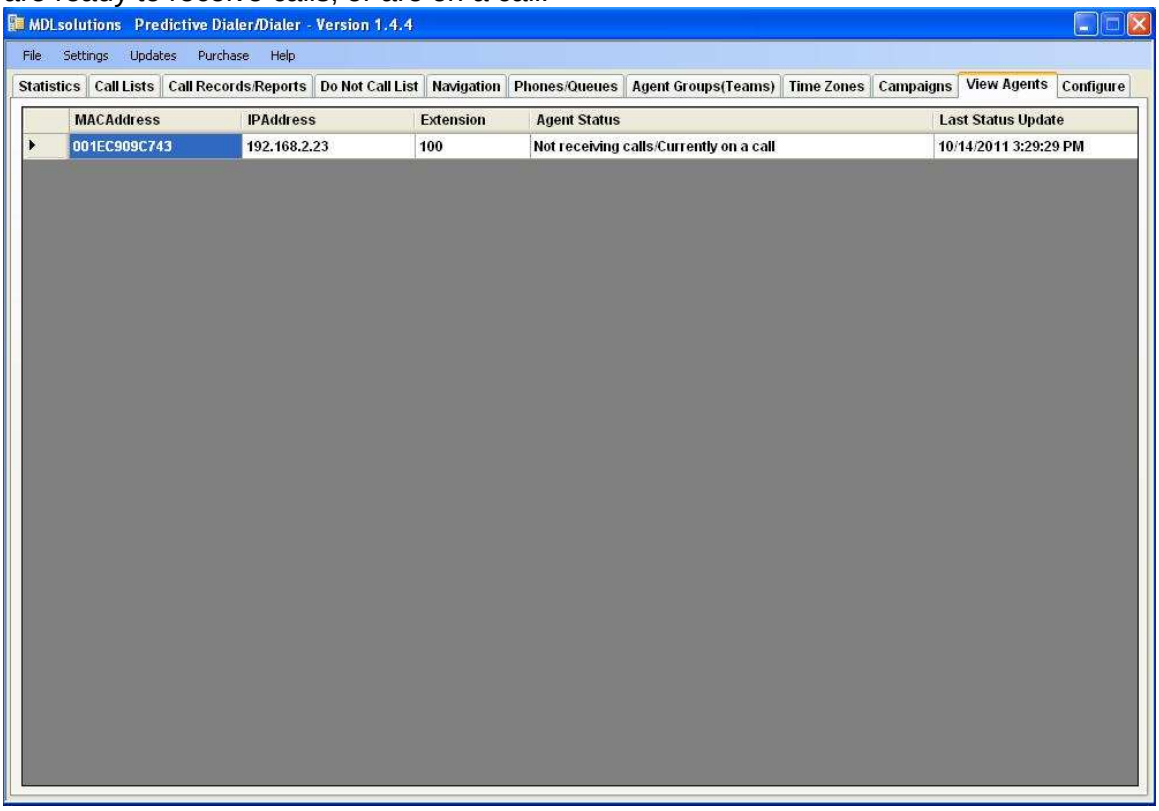
Campaigns are used for grouping call lists together that target a specific criteria (Campaign). Once a campaign is defined, it can be reference through out the Predictive Dialer.


MDLsolutions Predictive Dialer/Dialer - Version 1.4.4
File Settings Updates Purchase Help
Statistics Call Lists Call Records/Reports Do Not Call List Navigation Phones/Queues Agent Groups(Teams) Time Zones Campaigns View Agents Configure
ID Campaign Name Campaign Description Campaign Cost
1 My Clients Let my clients no about my product. 55000.0000
Help -- Adding a Campaign.
1 - Simply add a Campaign by entering the fields below. Name is the Campaign name, Description is the description for the Campaign and Cost is the total cost of the Campaign.
ID: 1 Name: My Clients Description: Let my clients no about my product. Cost: 55000.00
Add Update Delete

**ID:** Record ID.
**Name:** Name of the campaign.
**Description:** A brief description of the campaign.
**Cost:** Reserved for later versions.
**Add:** Adds a new campaign.
**Update:** Updates selected campaign.
**Delete:** Delete selected campaign.

## View Agents

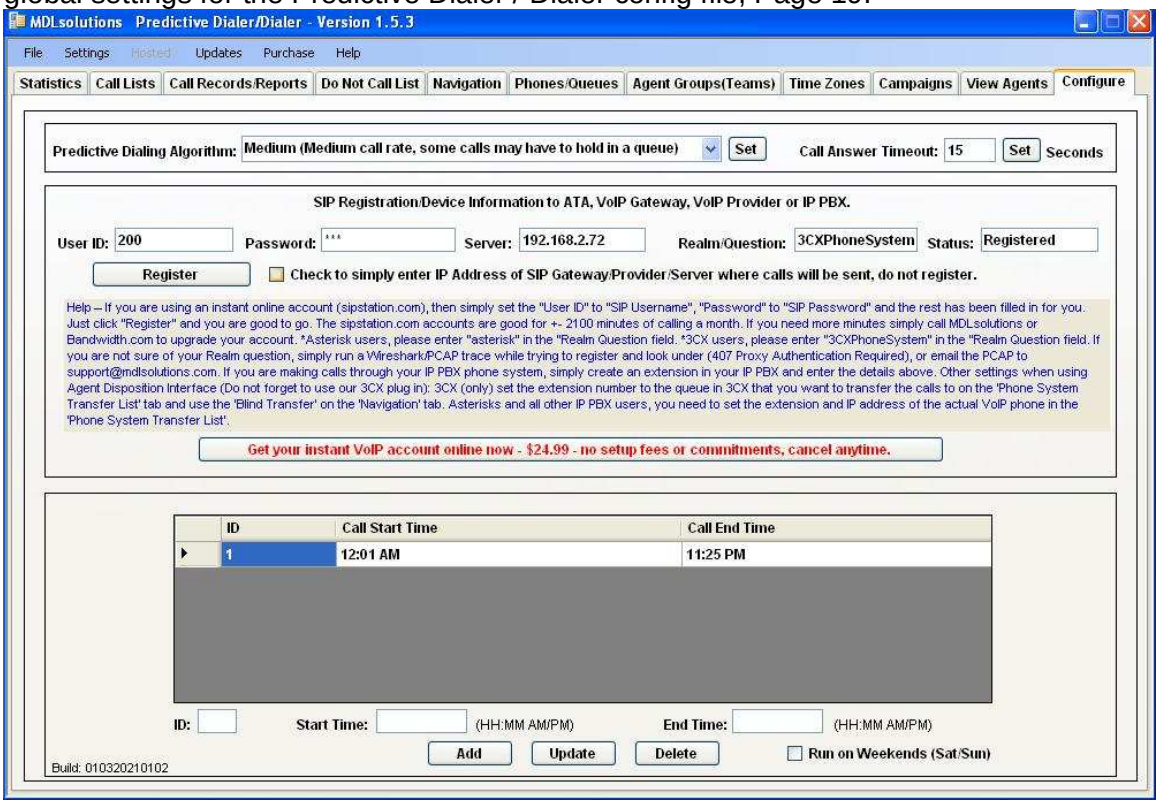
View agents is used for seeing which agents have launched their Agent Interface and are ready to receive calls, or are on a call.




**MACAddress:** MAC Address of the computer that the Agent Interface is installed on.
**IPAddress:** IP Address of the computer that the Agent Interface is installed on.
**Extension:** Extension of the agent.
**Agent Status:** If the agent is ready to receive calls or is on a call.
**Last Status Update:** The last time the agent clicked on “Ready to receive calls”.

## Configure

Configuration is used for configuring global settings. Please note there are additional global settings for the Predictive Dialer / Dialer config file, Page 19.


MDLsolutions Predictive Dialer/Dialer - Version 1.5.3
File Settings Hosted Updates Purchase Help
Statistics Call Lists Call Records/Reports Do Not Call List Navigation Phones/Queues Agent Groups(Teams) Time Zones Campaigns View Agents Configure
Predictive Dialing Algorithm: Medium (Medium call rate, some calls may have to hold in a queue) Set
Call Answer Timeout: 15 Set Seconds
SIP Registration/Device Information to ATA, VoIP Gateway, VoIP Provider or IP PBX.
User ID: 200 Password: *** Server: 192.168.2.72 Realm/Question: 3CXPhoneSystem Status: Registered
Register
Check to simply enter IP Address of SIP Gateway/Provider/Server where calls will be sent, do not register.
Help -- If you are using an instant online account (sipstation.com), then simply set the "User ID" to "SIP Username", "Password" to "SIP Password" and the rest has been filled in for you. Just click "Register" and you are good to go. The sipstation.com accounts are good for +- 2100 minutes of calling a month. If you need more minutes simply call MDLsolutions or Bandwidth.com to upgrade your account. *Asterisk users, please enter "asterisk" in the "Realm Question field. *3CX users, please enter "3CXPhoneSystem" in the "Realm Question field. If you are not sure of your Realm question, simply run a Wireshark/PCAP trace while trying to register and look under (407 Proxy Authentication Required), or email the PCAP to support@mdlsolutions.com. If you are making calls through your IP PBX phone system, simply create an extension in your IP PBX and enter the details above. Other settings when using Agent Disposition Interface (Do not forget to use our 3CX plug in): 3CX (only) set the extension number to the queue in 3CX that you want to transfer the calls to on the 'Phone System Transfer List' tab and use the 'Blind Transfer' on the 'Navigation' tab. Asterisks and all other IP PBX users, you need to set the extension and IP address of the actual VoIP phone in the 'Phone System Transfer List'.
Get your instant VoIP account online now - $24.99 - no setup fees or commitments, cancel anytime.
ID
Call Start Time
Call End Time
1
12:01 AM
11:25 PM
ID:
Start Time:
(HH:MM AM/PM)
End Time:
(HH:MM AM/PM)
Add
Update
Delete
Run on Weekends (Sat/Sun)
Build: 010320210102

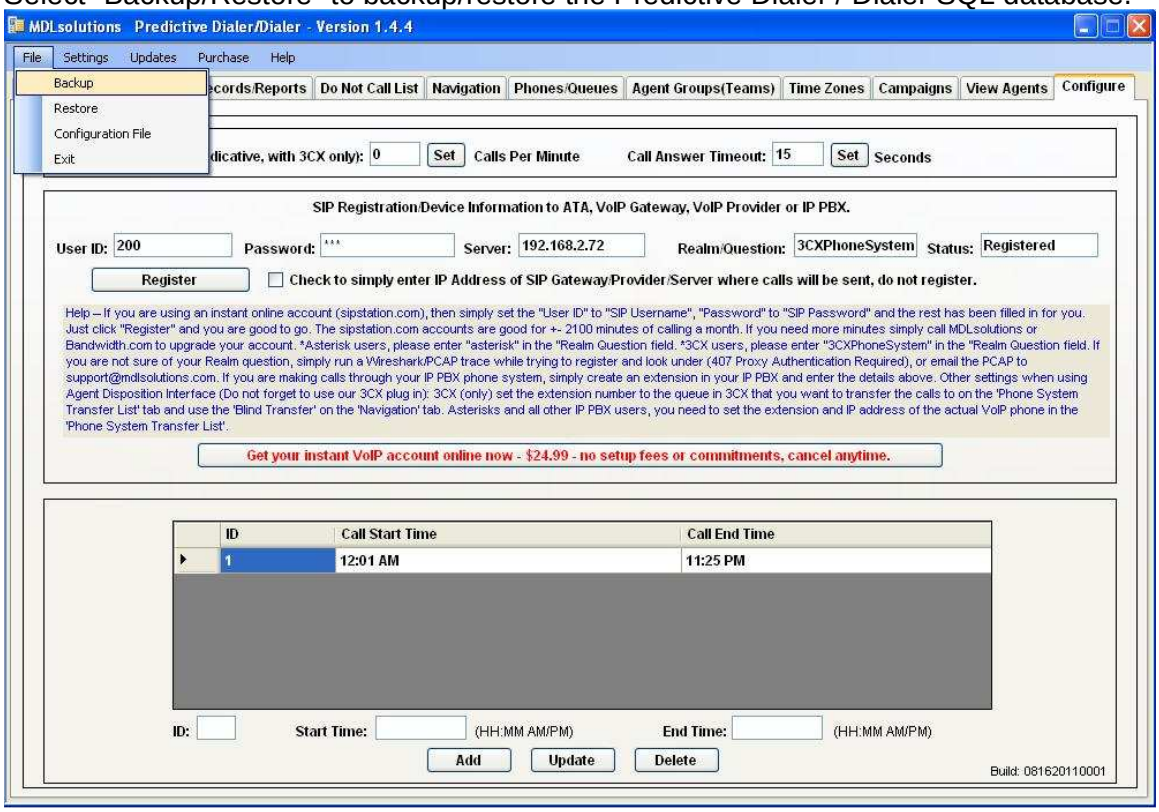
**Predictive Dialing Algorithm:** Set the Predictive Dialer to the user selected algorithm.
Options:
Exact: Makes sure there is an agent available for each call.
Medium: Medium call rate, some calls may have to hold in the 3CX queue.
High: High call rate, extra calls will be waiting in the 3CX queue.
Max: As many calls as possible, extra calls will wait in the 3CX queue.
**Call Answer Timeout:** The amount of time the Predictive Dialer / Dialer waits for the call to be answered before disconnecting.
**SIP Registration/Device Information (Outbound Calls):**
SIP User ID: The user ID required by the SIP endpoint in order to register.
SIP Password: The password required by the SIP endpoint in order to register.
SIP Server: The IP Address of the SIP endpoint you are registering with or/and sending your outbound calls to.
Realm/Challenge Question: May need to be provided. Please check with your VoIP provider or reference your VoIP gateway or IP PBX user guide.
Status: If your registration was successful or not.
Register: Click the registration button to submit your registration information to the SIP endpoint. You can also select the check box if the Predictive Dialer / Dialer is not required to register with the SIP end point.

**Start Stop Time Grid:**
“ID”= record id
“Call Start Time”=The global time you want the calls to start dialing.
“Call End Time”=The global time you want the calls to stop dialing.
**ID:** Record ID.
**Start Time:** The time you want the calls to start dialing.
**End Time:** The time you want the calls to stop dialing.
**Run On Weekends(Sat/Sun):** If you want the Dialer/Predictive Dialer to run on weekends according to the defined time schedule then check this box.

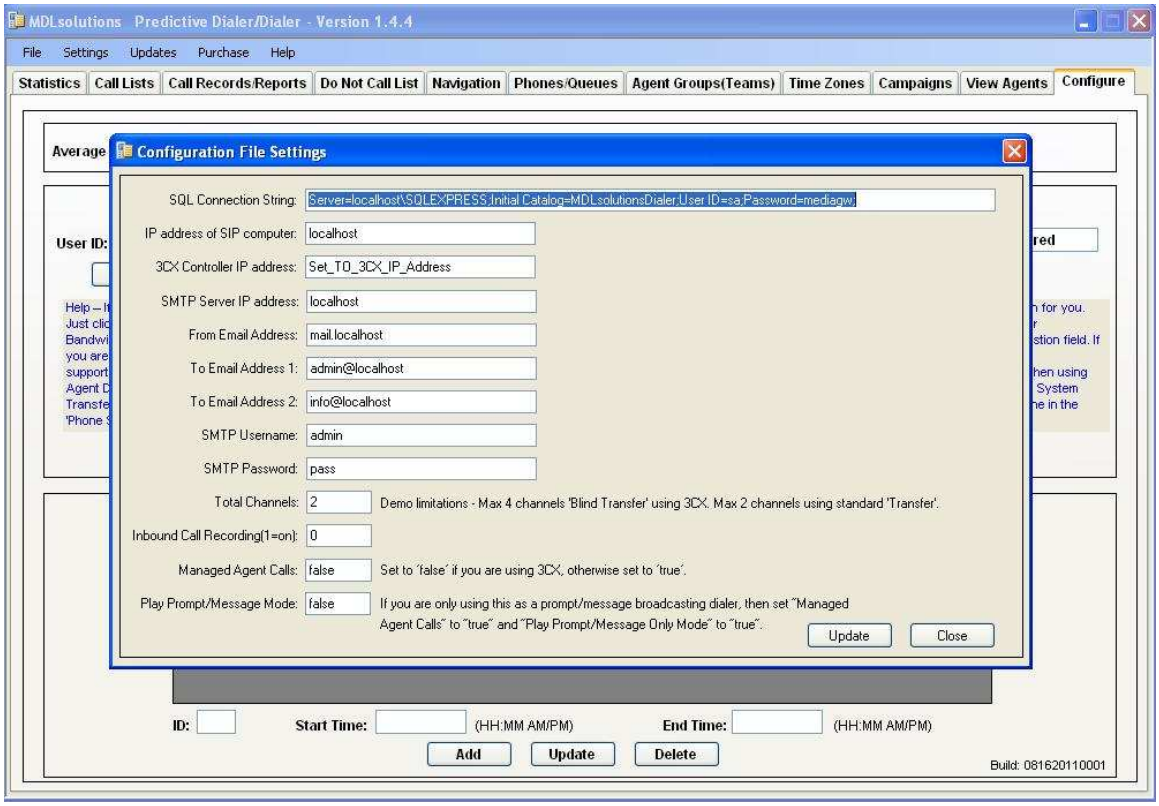
## Menu Options

Below are the details on several of the menu options offered by the Predictive Dialer / Dialer.

Select “Backup/Restore” to backup/restore the Predictive Dialer / Dialer SQL database.


MDLsolutions Predictive Dialer/Dialer - Version 1.4.4
File
Settings
Updates
Purchase
Help
Backup
Restore
Configuration File
Exit
Do Not Call List
Navigation
Phones/Queues
Agent Groups(Teams)
Time Zones
Campaigns
View Agents
Configure
Set
Calls Per Minute
Call Answer Timeout:
Seconds
SIP Registration/Device Information to ATA, VoIP Gateway, VoIP Provider or IP PBX.
User ID: 200
Password:
Server: 192.168.2.72
Realm/Question: 3CXPhoneSystem
Status: Registered
Register
Check to simply enter IP Address of SIP Gateway/Provider/Server where calls will be sent, do not register.
Help -- If you are using an instant online account (sipstation.com), then simply set the "User ID" to "SIP Username", "Password" to "SIP Password" and the rest has been filled in for you. Just click "Register" and you are good to go. The sipstation.com accounts are good for +- 2100 minutes of calling a month. If you need more minutes simply call MDLsolutions or Bandwidth.com to upgrade your account. *Asterisk users, please enter "asterisk" in the "Realm Question field. *3CX users, please enter "3CXPhoneSystem" in the "Realm Question field. If you are not sure of your Realm question, simply run a Wireshark/PCAP trace while trying to register and look under (407 Proxy Authentication Required), or email the PCAP to support@mdlsolutions.com. If you are making calls through your IP PBX phone system, simply create an extension in your IP PBX and enter the details above. Other settings when using Agent Disposition Interface (Do not forget to use our 3CX plug in): 3CX (only) set the extension number to the queue in 3CX that you want to transfer the calls to on the 'Phone System Transfer List' tab and use the 'Blind Transfer' on the 'Navigation' tab. Asterisks and all other IP PBX users, you need to set the extension and IP address of the actual VoIP phone in the 'Phone System Transfer List'.
Get your instant VoIP account online now - $24.99 - no setup fees or commitments, cancel anytime.
ID
Call Start Time
Call End Time
1
12:01 AM
11:25 PM
ID:
Start Time:
(HH:MM AM/PM)
End Time:
(HH:MM AM/PM)
Add
Update
Delete
Build: 081620110001

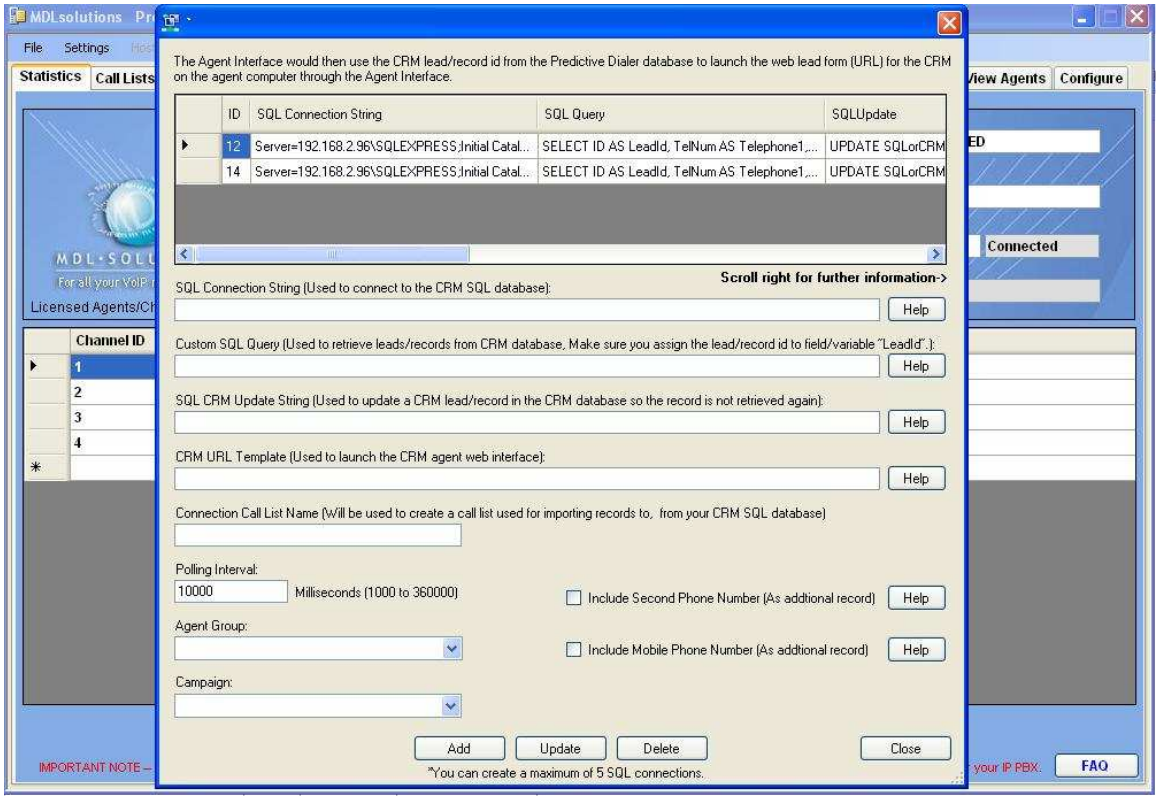
Select “File”/”Configuration” to set the Predictive Dialer / Dialer global configuration settings.


MDLsolutions Predictive Dialer/Dialer - Version 1.4.4
File Settings Updates Purchase Help
Statistics Call Lists Call Records/Reports Do Not Call List Navigation Phones/Queues Agent Groups(Teams) Time Zones Campaigns View Agents Configure
Configuration File Settings
SQL Connection String: Server=localhost\SQLEXPRESS;Initial Catalog=MDLsolutionsDialer;User ID=sa;Password=mediagw
IP address of SIP computer: localhost
3CX Controller IP address: Set_TO_3CX_IP_Address
SMTP Server IP address: localhost
From Email Address: mail.localhost
To Email Address 1: admin@localhost
To Email Address 2: info@localhost
SMTP Username: admin
SMTP Password: pass
Total Channels: 2
Demo limitations - Max 4 channels 'Blind Transfer' using 3CX. Max 2 channels using standard 'Transfer'.
Inbound Call Recording(1=on): 0
Managed Agent Calls: false
Set to 'false' if you are using 3CX, otherwise set to 'true'.
Play Prompt/Message Mode: false
If you are only using this as a prompt/message broadcasting dialer, then set "Managed Agent Calls" to "true" and "Play Prompt/Message Only Mode" to "true".
Update
Close
ID:
Start Time:
(HH:MM AM/PM)
End Time:
(HH:MM AM/PM)
Add
Update
Delete
Build: 081620110001

Set:
a. SQLConnectingString(Value) to your database server IP address, same IP Address (localhost) as this computer if you are going to install SQL Server on this computer.
c. LocalIP(Value) to the IP Address of the computer you are installing the dialer on. The default “localhost” should work just fine.
d. 3CXController(Value) to the IP address of your 3CX phone server that has the MDLsolutions plug in. To install the plug in, simply download it from the MDLsolutions website (dialer web page) and copy/paste it into “C:\Progam File\3CX PhoneSystem\Bin” (2003/XP Pro) - c:\Program Files(x86)\3CX PhoneSystem\Bin (2008/Windows 7), double click on the plug in. Click minimize for plug-in to be hidden and added to the bottom right system tray.
e. FromEmailAddress(Value) to the email address you want your email notifications to come from.
f. ToEmailAddress1(Value) to the email address you want your email notifications to go to.
g. ToEmailAddress2(Value) to the email address you want your email notifications to go to.
h. Username(Value) to your SMTP server login username. Use hMailserver(free), if you need an SMTP server.
i. Password(Value) to your SMTP server login password.
j. Total Channels the total amount of channels the Dialer/Predictive Dialer can run simultaneously. Cannot exceed your total licensed amount. Demo max is 4 channels.

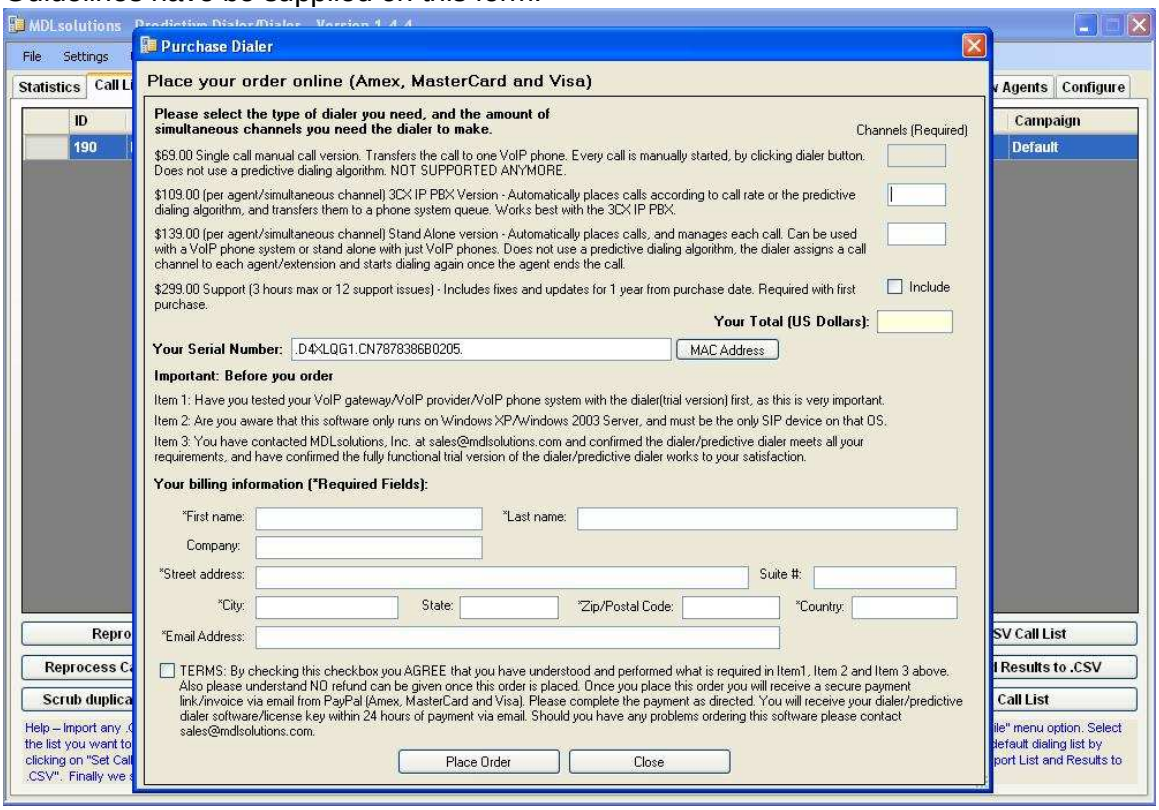
k. ManagedAgentCalls (Value) to false if you are using 3CX, otherwise true. Also set to true when playing pre recorded messages.
l. DialerModeOnly(Value) to false if you are using 3CX, otherwise true when just playing pre recorded messages.
m. PredictiveDialerLoad(Value) The Predictive Dialing algorithm will try to make 100% sure there is always an agent available for every call, but if that is not a requirement and you want the Predictive Dialer to make more calls then available agents, then just increment this setting to increase the call rates. Calls not immediately answered by the agents will be left in the 3CX queue, please make sure you have a message playing that explains why a client was called, and that they need to hold on.

Select “Settings”/ “CRM DB Connector” to set the values necessary to connect to a SQL database that contains the call records you want imported and dialed. Max is 5 connections in the trial/production version. More connections can be enabled at an additional cost.

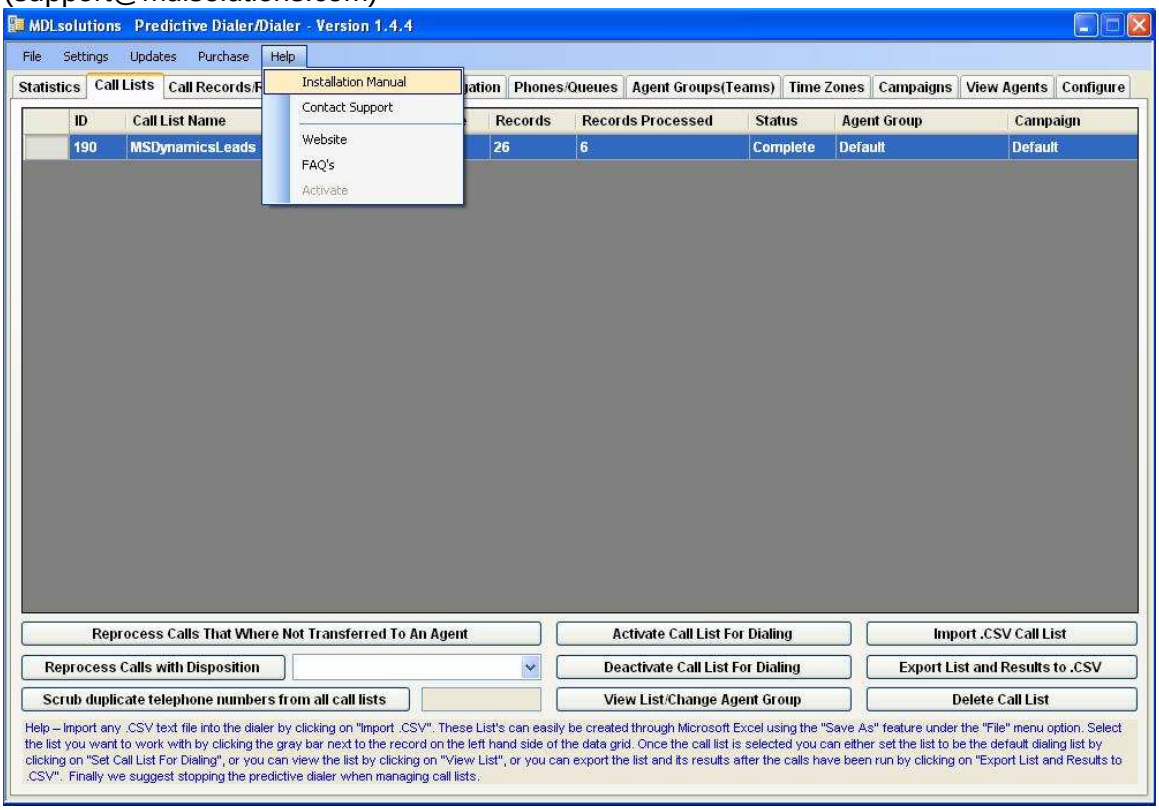

MDLsolutions
File
Settings
Statistics
Call Lists
View Agents
Configure
Connected
Licensed Agents/Ch
Channel ID
1
2
3
4
IMPORTANT NOTE –
your IP PBX.
FAQ
The Agent Interface would then use the CRM lead/record id from the Predictive Dialer database to launch the web lead form (URL) for the CRM on the agent computer through the Agent Interface.
ID
SQL Connection String
SQL Query
SQLUpdate
12
Server=192.168.2.96\SQLEXPRESS;Initial Catal...
SELECT ID AS LeadId, TelNum AS Telephone1,...
UPDATE SQLorCRM
14
Server=192.168.2.96\SQLEXPRESS;Initial Catal...
SELECT ID AS LeadId, TelNum AS Telephone1,...
UPDATE SQLorCRM
Scroll right for further information->
SQL Connection String (Used to connect to the CRM SQL database):
Help
Custom SQL Query (Used to retrieve leads/records from CRM database, Make sure you assign the lead/record id to field/variable "LeadId".):
Help
SQL CRM Update String (Used to update a CRM lead/record in the CRM database so the record is not retrieved again):
Help
CRM URL Template (Used to launch the CRM agent web interface):
Help
Connection Call List Name (Will be used to create a call list used for importing records to, from your CRM SQL database)
Polling Interval:
10000
Milliseconds (1000 to 360000)
Include Second Phone Number (As addtional record)
Help
Agent Group:
Include Mobile Phone Number (As addtional record)
Help
Campaign:
Add
Update
Delete
Close
*You can create a maximum of 5 SQL connections.

SQL Connection String: The SQL connection string for the SQL Database.
Custom SQL Query: The SQL query used for finding the leads you require in the SQL Database.
SQL CRM Update String: Used to updated the SQL call record, so it is not imported again. Suggestion, use “DoNotPhone” for MS Dynamics.
Polling Interval: How long you want the Predictive Dialer to wait before polling your database for more records.
CRM URL Template: The URL the Agent Interface will use to launch the CRM lead.
MS Dynamics only - The [LEAD_ID], is usually put after the ‘id=’, between ‘%’ and after the two initial characters ie: ‘7b’.
Connection Call List Name: Will be used to create a call list used for importing records to, from your CRM SQL database.

Select “Purchase” / ”Purchase Dialer” to purchase the Predictive Dialer / Dialer online. Guidelines have be supplied on this form.


MDLsolutions
File
Settings
Statistics
Agents
Configure
ID
190
Campaign
Default
Purchase Dialer
Place your order online (Amex, MasterCard and Visa)
Please select the type of dialer you need, and the amount of simultaneous channels you need the dialer to make.
Channels (Required)
$69.00 Single call manual call version. Transfers the call to one VoIP phone. Every call is manually started, by clicking dialer button. Does not use a predictive dialing algorithm. NOT SUPPORTED ANYMORE.
$109.00 (per agent/simultaneous channel) 3CX IP PBX Version - Automatically places calls according to call rate or the predictive dialing algorithm, and transfers them to a phone system queue. Works best with the 3CX IP PBX.
$139.00 (per agent/simultaneous channel) Stand Alone version - Automatically places calls, and manages each call. Can be used with a VoIP phone system or stand alone with just VoIP phones. Does not use a predictive dialing algorithm, the dialer assigns a call channel to each agent/extension and starts dialing again once the agent ends the call.
$299.00 Support (3 hours max or 12 support issues) - Includes fixes and updates for 1 year from purchase date. Required with first purchase.
Include
Your Total (US Dollars):
Your Serial Number:
.D4XLQG1.CN7878386B0205.
MAC Address
Important: Before you order
Item 1: Have you tested your VoIP gateway/VoIP provider/VoIP phone system with the dialer(trial version) first, as this is very important.
Item 2: Are you aware that this software only runs on Windows XP/Windows 2003 Server, and must be the only SIP device on that OS.
Item 3: You have contacted MDLsolutions, Inc. at sales@mdlsolutions.com and confirmed the dialer/predictive dialer meets all your requirements, and have confirmed the fully functional trial version of the dialer/predictive dialer works to your satisfaction.
Your billing information (*Required Fields):
*First name:
*Last name:
Company:
*Street address:
Suite #:
*City:
State:
*Zip/Postal Code:
*Country:
*Email Address:
TERMS: By checking this checkbox you AGREE that you have understood and performed what is required in Item1, Item 2 and Item 3 above. Also please understand NO refund can be given once this order is placed. Once you place this order you will receive a secure payment link/invoice via email from PayPal (Amex, MasterCard and Visa). Please complete the payment as directed. You will receive your dialer/predictive dialer software/license key within 24 hours of payment via email. Should you have any problems ordering this software please contact sales@mdlsolutions.com.
Place Order
Close

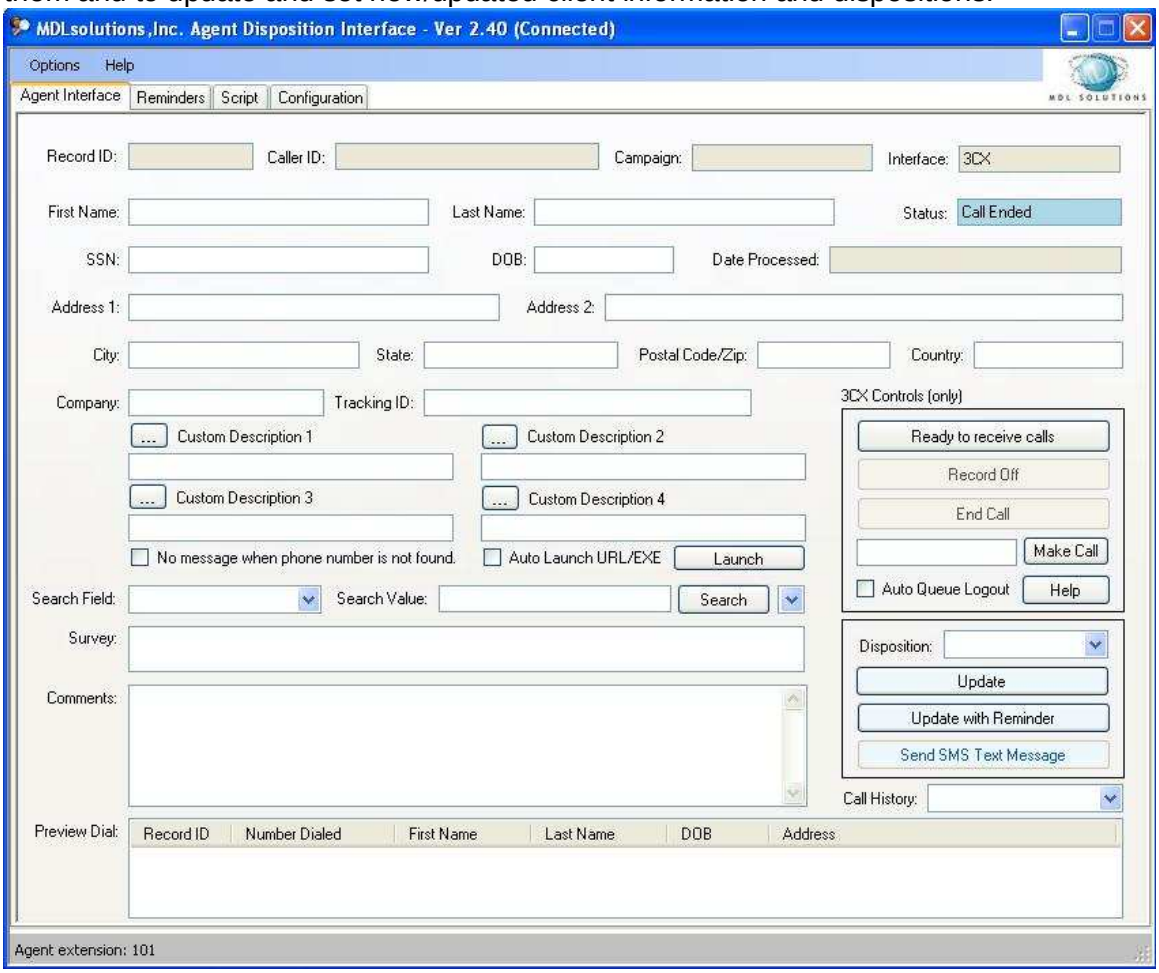
Select “Help” General help information and how to contact support (support@mdlsolutions.com)


MDLsolutions Predictive Dialer/Dialer - Version 1.4.4
File
Settings
Updates
Purchase
Help
Installation Manual
Contact Support
Website
FAQ's
Activate
Statistics
Call Lists
Call Records/R
Phones/Queues
Agent Groups(Teams)
Time Zones
Campaigns
View Agents
Configure
ID
Call List Name
Records
Records Processed
Status
Agent Group
Campaign
190
MSDynamicsLeads
26
6
Complete
Default
Default
Reprocess Calls That Where Not Transferred To An Agent
Activate Call List For Dialing
Import .CSV Call List
Reprocess Calls with Disposition
Deactivate Call List For Dialing
Export List and Results to .CSV
Scrub duplicate telephone numbers from all call lists
View List/Change Agent Group
Delete Call List
Help – Import any .CSV text file into the dialer by clicking on "Import .CSV". These List's can easily be created through Microsoft Excel using the "Save As" feature under the "File" menu option. Select the list you want to work with by clicking the gray bar next to the record on the left hand side of the data grid. Once the call list is selected you can either set the list to be the default dialing list by clicking on "Set Call List For Dialing", or you can view the list by clicking on "View List", or you can export the list and its results after the calls have been run by clicking on "Export List and Results to .CSV". Finally we suggest stopping the predictive dialer when managing call lists.

# *2: Agent Interface*

## Agent Interface

The Agent Interface is used by the agents to see which client has been transferred to them and to update and set new/updated client information and dispositions.

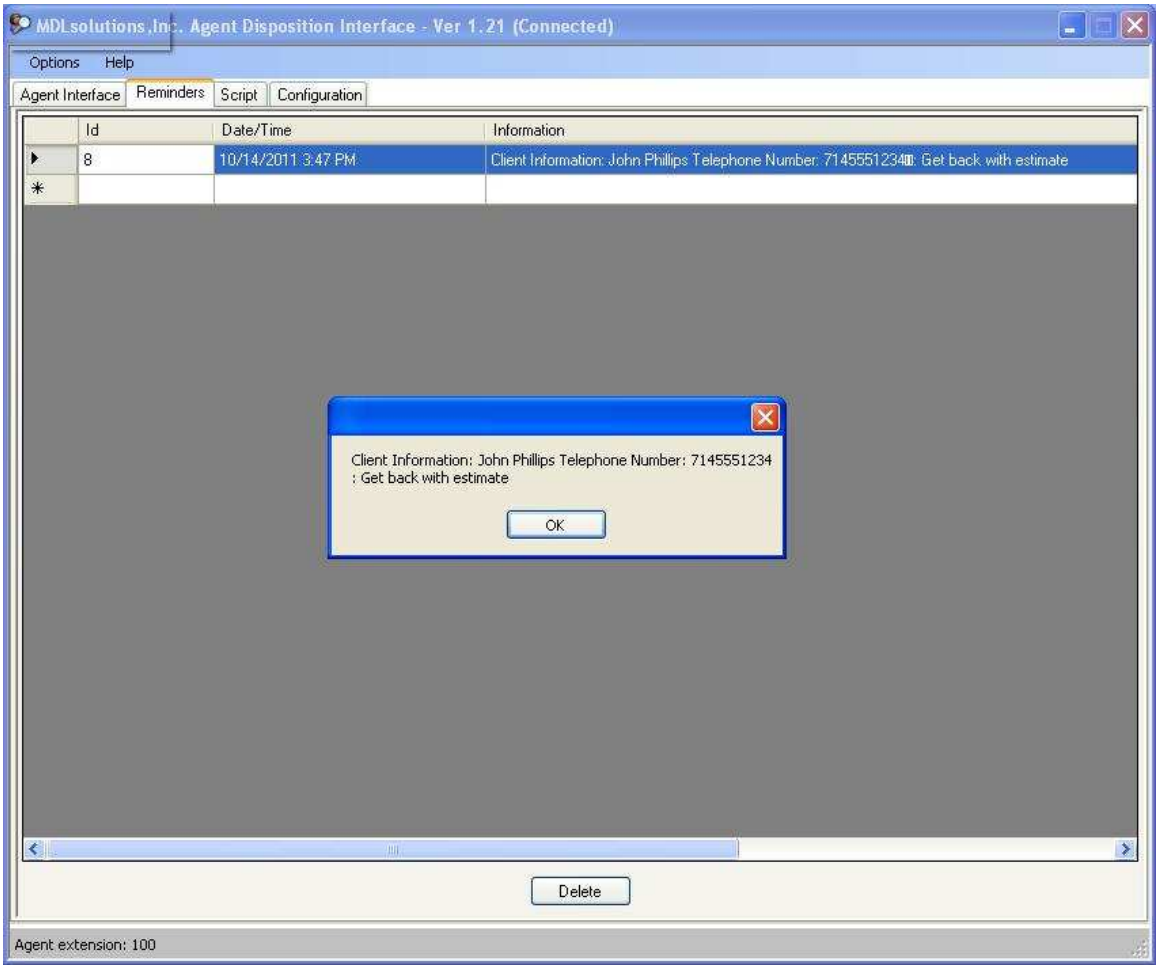



**Record ID:** The actual record id of the call record.
**Caller ID:** The telephone number of the client, that has been transferred to the agent.
**Campaign:** The campaign the call record was assigned to.
**Interface:** 3CX or Direct, currently 3CX is recommended.
**Status:** Whether the call is connected or disconnected.
**First Name:** The first name of the client, that has been transferred to the agent.
**Last Name:** The last name of the client, that has been transferred to the agent.
**Record:** The call record id for future reference.
**SSN:** The social security of the client, that has been transferred to the agent.
**DOB:** The date of birth of the client, that has been transferred to the agent.
**Date Processed:** The date the call record was processed.

**Address 1:** The first address of the client, that has been transferred to the agent.
**Address 2:** The second address of the client, that has been transferred to the agent.
**City:** The city of the client, that has been transferred to the agent.
**State:** The state of the client, that has been transferred to the agent.
**Postal Code/Zip:** The postal code or zip code of the client, that has been transferred to the agent.
**Country:** The country of the client, that has been transferred to the agent.
**Company:** The company of the client, that has been transferred to the agent.
**Tracking ID:** A custom transaction id, that can be set by the agent or call list provider.
**Custom 1:** A custom field that can be set by the call center manager or agent.
**Custom 2:** A custom field that can be set by the call center manager or agent.
**Custom 3:** A custom field that can be set by the call center manager or agent.
**Custom 4:** A custom field that can be set by the call center manager or agent.
**Auto Launch URL/EXE:** Will automatically launch the website/URL or application/EXE that is directly related to the call list when checked. This can be defined when the call list is imported through the Dialer/Predictive Dialer.
**Launch:** Test the URL/EXE related to the call list record.
**Survey:** Allows the agent to ask the person dialed a set of questions that were previously defined by the Call Center Manager Dashboard, and that are recorded in the Predictive Dialer database, that can be exported with the call list. The value/s are stored under “SurveyOptions” field.
**Search Field:** Search the selected call record field, in order to find a specific call record.
**Search Value:** The value to search for.
**Search:** Click button to search.
**Comments:** Any comments you want to add/update for the current call record.
**Preview Dial:** Allows the agents to see the calls the Predictive Dialer is dialing.
**Ready to receive calls/Stop receiving calls:** Allows the agents to tell the Predictive Dialer when they are ready to receive calls and when they no longer want to receive calls.
**Record On/Off:** Allows the agent to turn on and off call recording.
**End Call:** End the current call.
**Make Call:** Make a call using the textbox on the left.
**Disposition:** Set the disposition that best describes the result of the discussion that the agent had with the client.
**Update:** Update the call record with the new disposition and any comments or fields that were changed during the call.
**Update with Reminder:** Update the call records with the new disposition and any comments or fields that were changed during the call, and at the same time set a date/time reminder, that will automatically remind you to call the client back.
**Send SMS Text Message:** Use to send the current caller id an SMS message. Requires user to signup to an SMS service provided through MDLsolutions.
**Call History:** Keeps a selectable record of all previous agent calls.

## Reminders

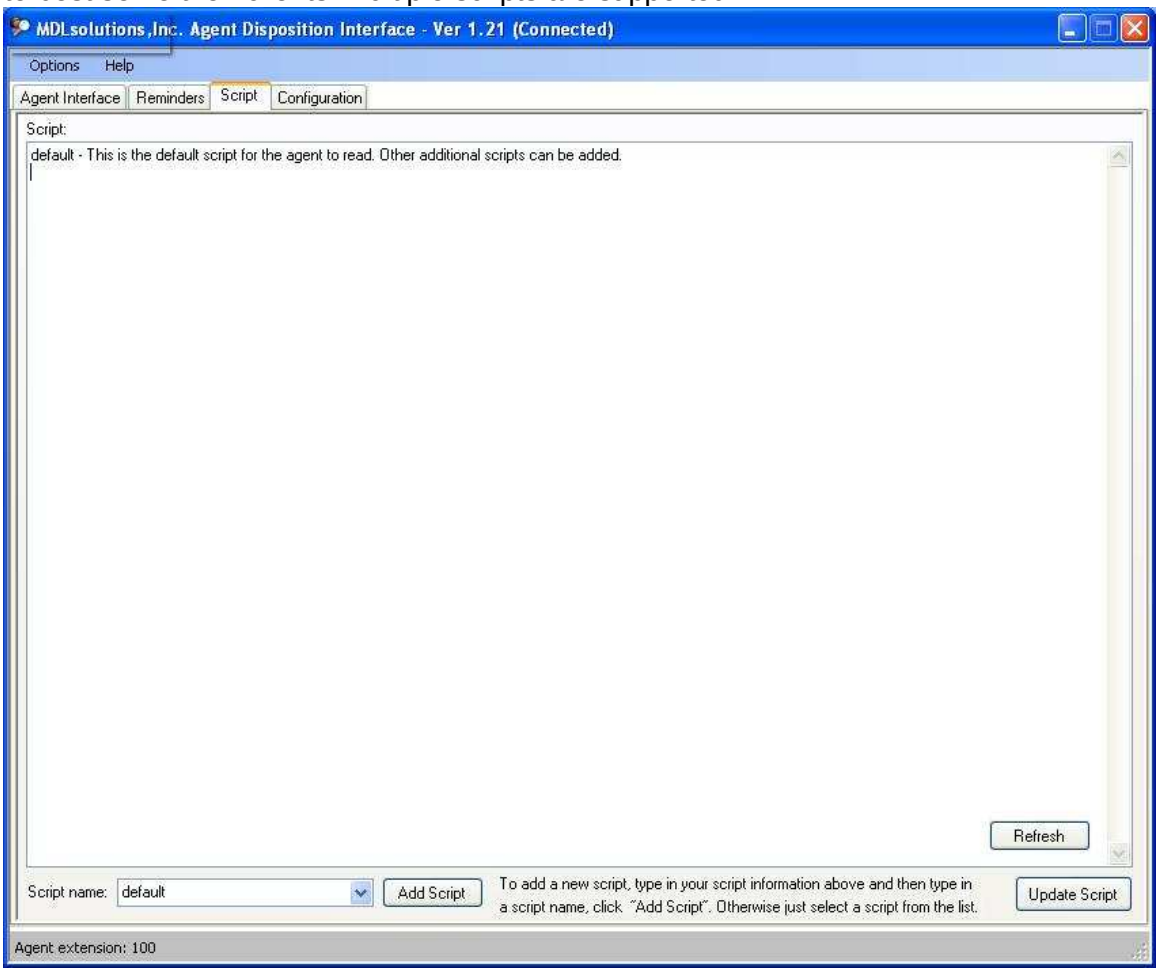
Reminders are set when the agent uses the “Update with Reminders” button. Simply double click on any reminder to see the details. Reminders are automatically launched when the date/time becomes relevant.




**Id:** Database id of the reminder.
**Date/Time:** Date/Time that the reminder will be launched.
**Information:** The information related to the reminder.

## Scripts

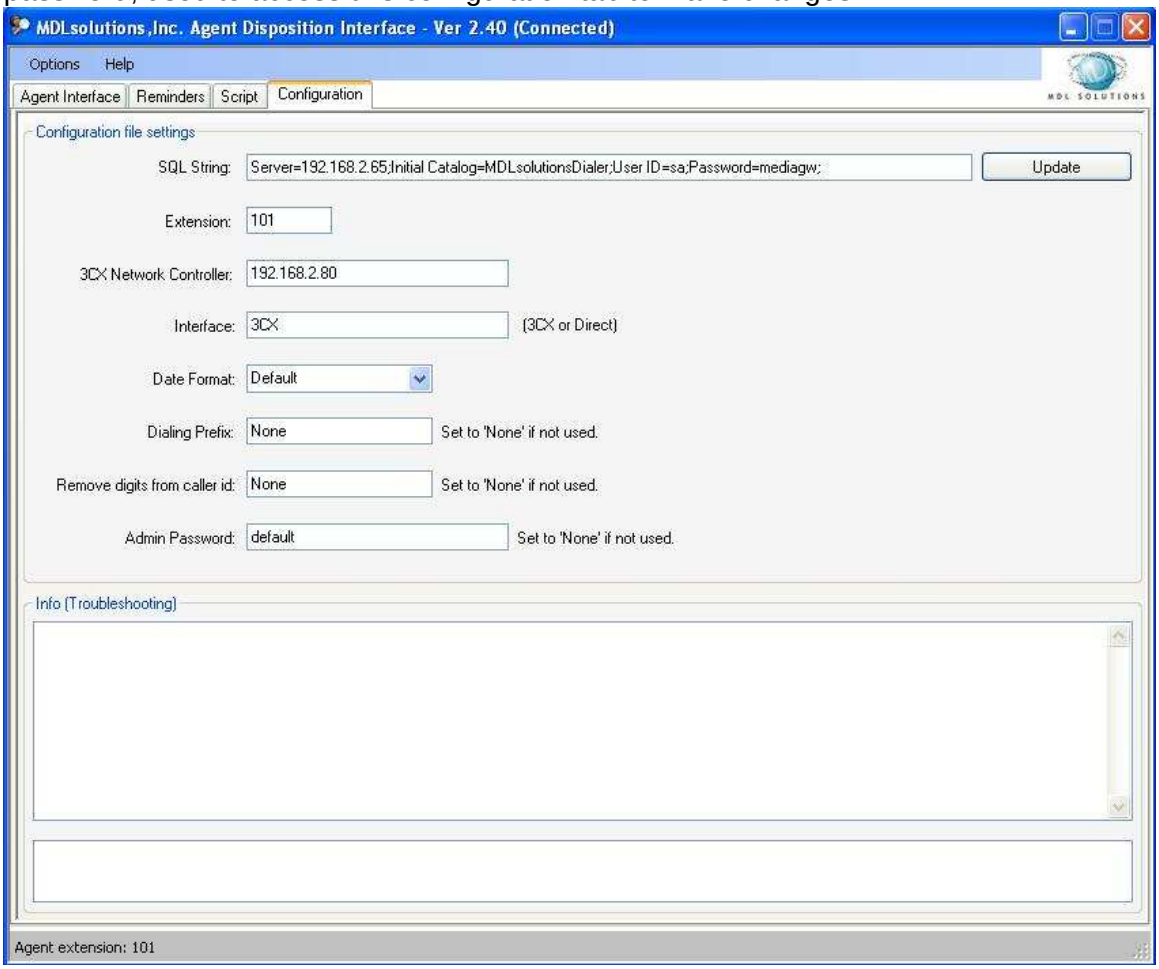
Scripts are used so that agents can have pointers/information available to them in order to best serve their clients. Multiple scripts are supported.


MDLsolutions,Inc. Agent Disposition Interface - Ver 1.21 (Connected)
Options
Help
Agent Interface
Reminders
Script
Configuration
Script:
default - This is the default script for the agent to read. Other additional scripts can be added.
Refresh
Script name:
default
Add Script
To add a new script, type in your script information above and then type in a script name, click "Add Script". Otherwise just select a script from the list.
Update Script
Agent extension: 100

**Script:** The script text.
**Script name:** The reference name for each individual script.
**Add Script:** Add a new script with new information.
**Update Script:** Update selected script with updated information.
**Refresh:** When the script is updated by another agent or supervisor, simply click on refresh to see the latest script information.

## Configuration

The configuration settings are used to connect the Agent Interface to the Predictive Dialer SQL database and 3CX IP PBX, as well as set the agent extension number, interface (3CX/Direct), date format (if the Predictive Dialer operating system uses a different date format from the agent interface operating system) and the administrator password, used to access this configuration tab to make changes.

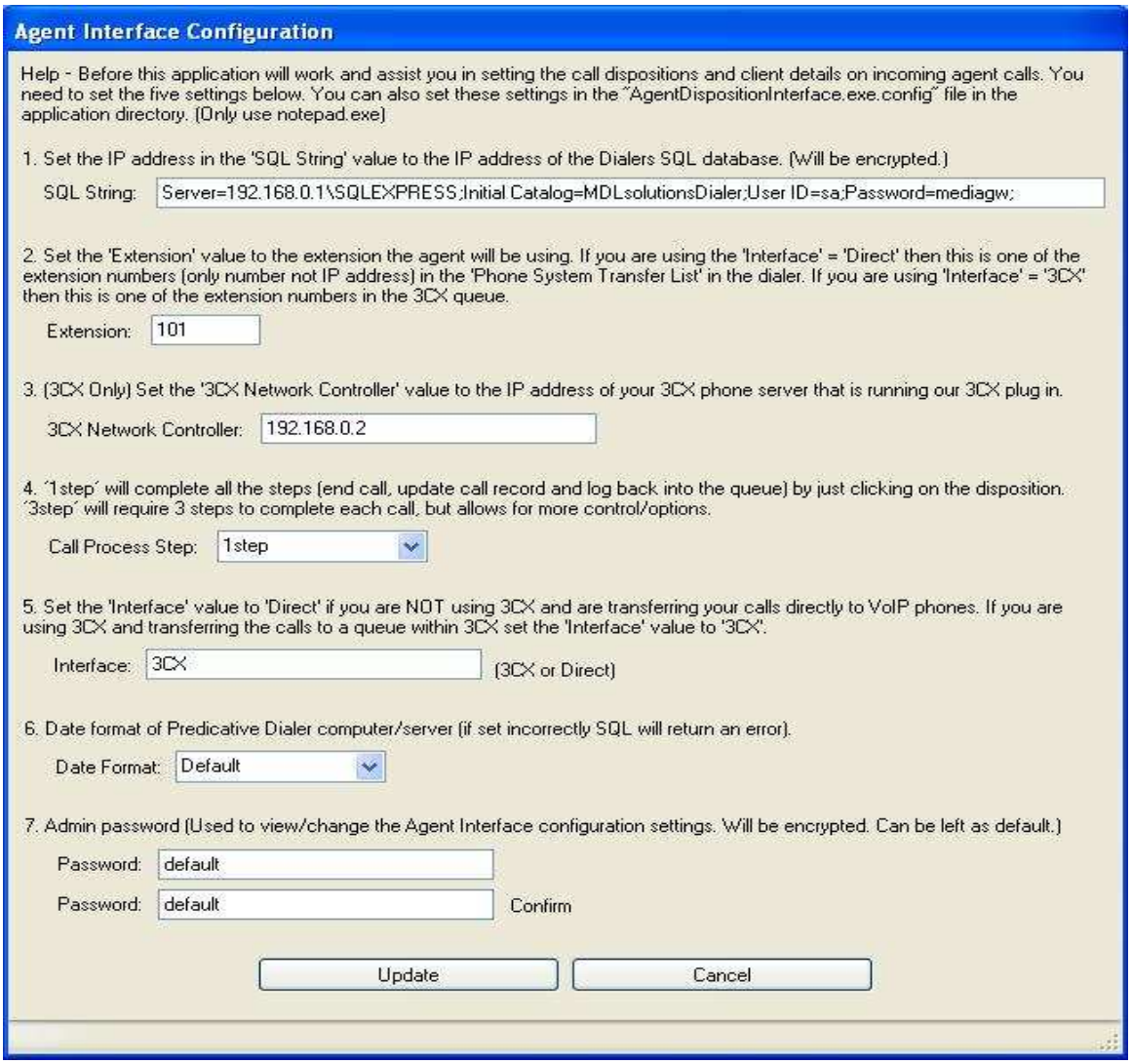



**SQL String:** The SQL string that is used to connect to the Predictive Dialer SQL database. Usually the IP address is the only value you need to change.
**Extension:** The agents 3CX extension.
**3CX Network Controller:** The IP address of the 3CX computer/operating system.
**Interface:** Set to 3CX if you are using 3CX as your IP PBX, otherwise Direct.
**Date Format:** If the date format of the Predictive Dialer operating system is different from the Agent Interface computer, then set the date format here.
**Admin Password:** Set the password for making changes to the Agent Interface configuration tab here.
**Dialing Prefix/Remove digits from caller id:** If you use a dialing prefix in the call records that 3CX uses to route calls, then input that under Dialing Prefix. If the caller id does not match your call records, then remove the leading numbers until it does.

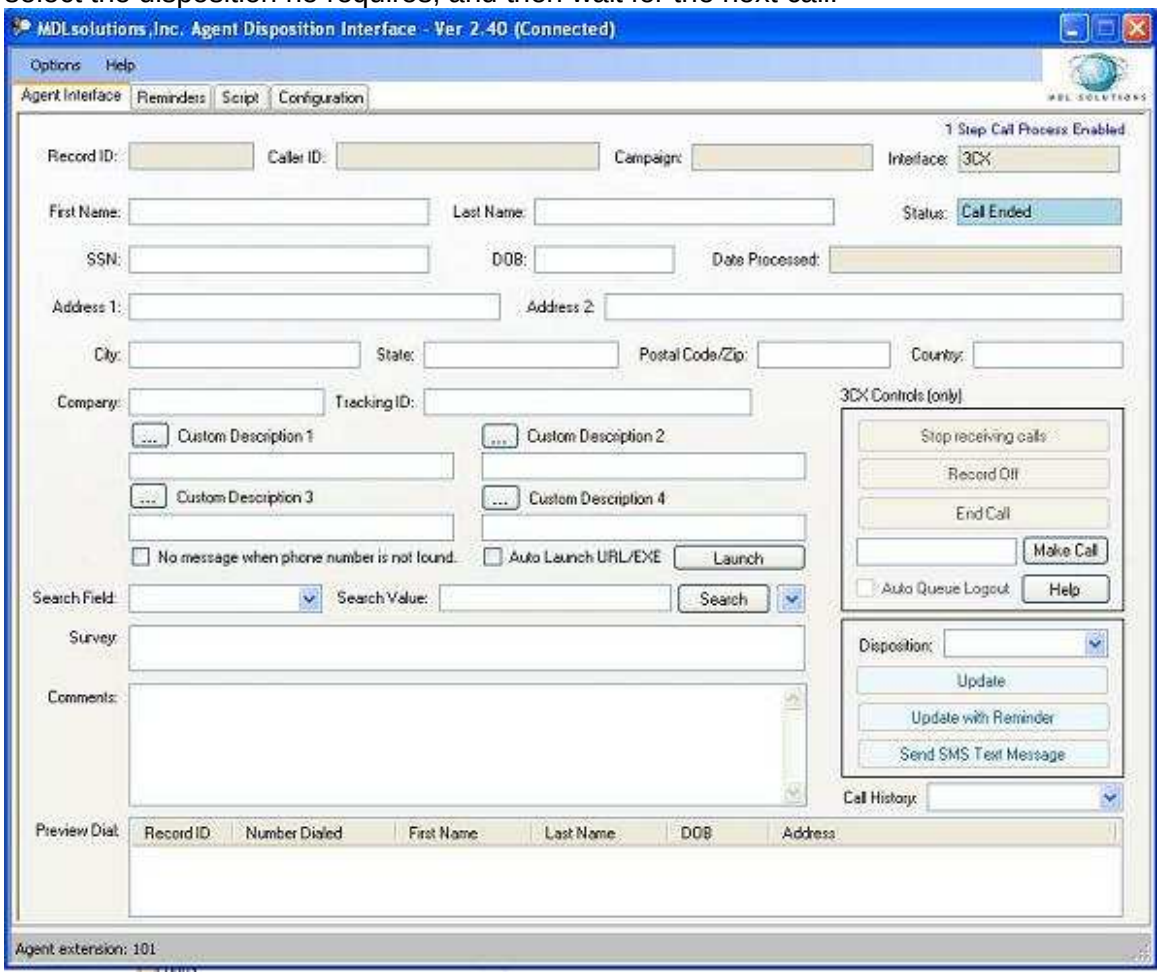
**AgentAltQueue:** Which is only found in the AgentDispositionInterface.exe.config file in the Agent Interface application folder under Program Files, is used when an Agent Is receiving calls from an incoming 3CX queue and from the Predictive Dialer at the same time. The "AgentAltQueue**"** value needs to be set to the extension number in the incoming 3CX queue. This will then allow the Agent Interface to manage all the agents calls correctly.
**Info(Troubleshooting):** Please email any error information you receive in this text box to support@mdlsolutions.com.

## 1 Step Call Processing

The agent has the option to use either 3 step call processing or 1 step call processing. 1 step call processing automates almost all of the call process steps (end call, update call record and log back into queue) when processing a call, by simply selecting the disposition, using the disposition drop down box.


Agent Interface Configuration
Help - Before this application will work and assist you in setting the call dispositions and client details on incoming agent calls. You need to set the five settings below. You can also set these settings in the "AgentDispositionInterface.exe.config" file in the application directory. (Only use notepad.exe)
1. Set the IP address in the 'SQL String' value to the IP address of the Dialers SQL database. (Will be encrypted.)
SQL String: Server=192.168.0.1\SQLEXPRESS;Initial Catalog=MDLsolutionsDialer;User ID=sa;Password=mediagw;
2. Set the 'Extension' value to the extension the agent will be using. If you are using the 'Interface' = 'Direct' then this is one of the extension numbers (only number not IP address) in the 'Phone System Transfer List' in the dialer. If you are using 'Interface' = '3CX' then this is one of the extension numbers in the 3CX queue.
Extension: 101
3. (3CX Only) Set the '3CX Network Controller' value to the IP address of your 3CX phone server that is running our 3CX plug in.
3CX Network Controller: 192.168.0.2
4. '1step' will complete all the steps (end call, update call record and log back into the queue) by just clicking on the disposition. '3step' will require 3 steps to complete each call, but allows for more control/options.
Call Process Step: 1step
5. Set the 'Interface' value to 'Direct' if you are NOT using 3CX and are transferring your calls directly to VoIP phones. If you are using 3CX and transferring the calls to a queue within 3CX set the 'Interface' value to '3CX'.
Interface: 3CX (3CX or Direct)
6. Date format of Predicative Dialer computer/server (if set incorrectly SQL will return an error).
Date Format: Default
7. Admin password (Used to view/change the Agent Interface configuration settings. Will be encrypted. Can be left as default.)
Password: default
Password: default Confirm
Update
Cancel

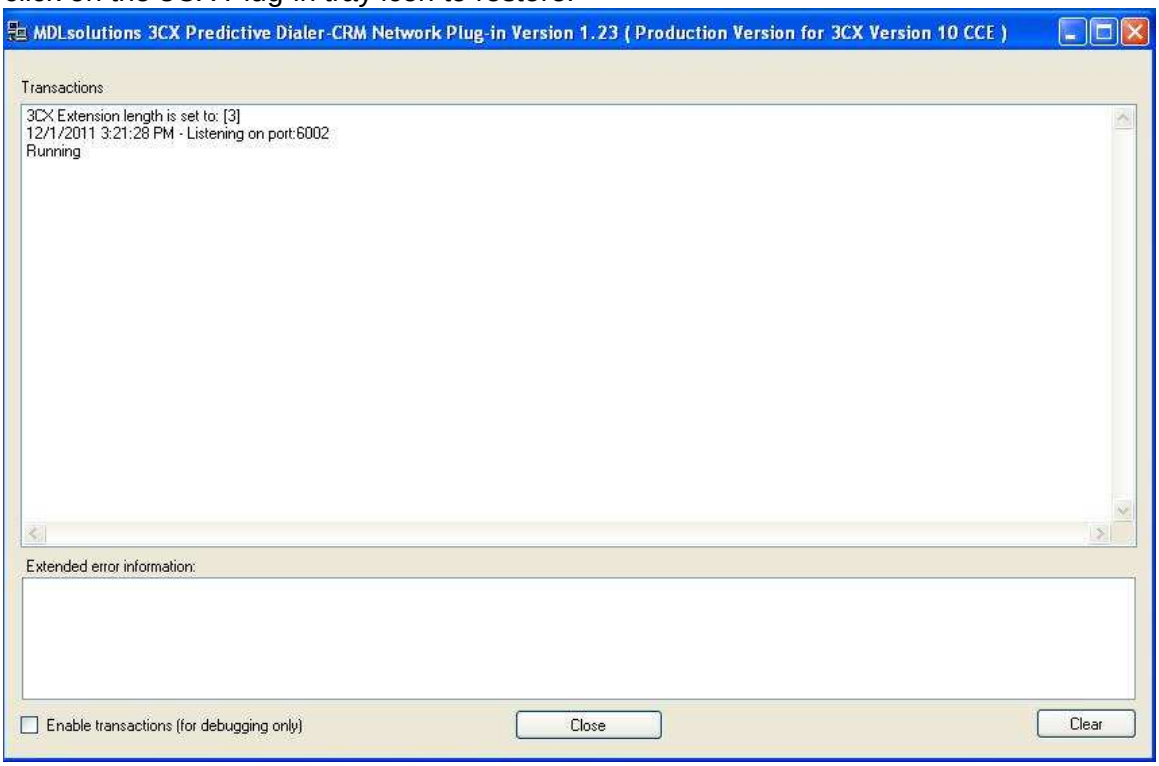
Once the Agent Interface has been configured to use 1 step call processing using the Agent Interface configuration application (ConfigApplication.exe), found in the Agent Interface application folder or at time of installation, the Agent Interface will then display '1 Step Call Process Enabled', below the disposition panel. Once the call has ended and the agent has entered all the necessary information, all the agent needs to do is simply select the disposition he requires, and then wait for the next call.



## *3: 3CX Plug-in*

### 3CX Plug-in

The 3CX Plug-in is used for connecting the Predictive Dialer and Agent Interface to the 3CX IP PBX. Simply install and launch this application, everything else is automated. If you minimize this application, it will hide itself in the operating system tray. Just right click on the 3CX Plug-in tray icon to restore.

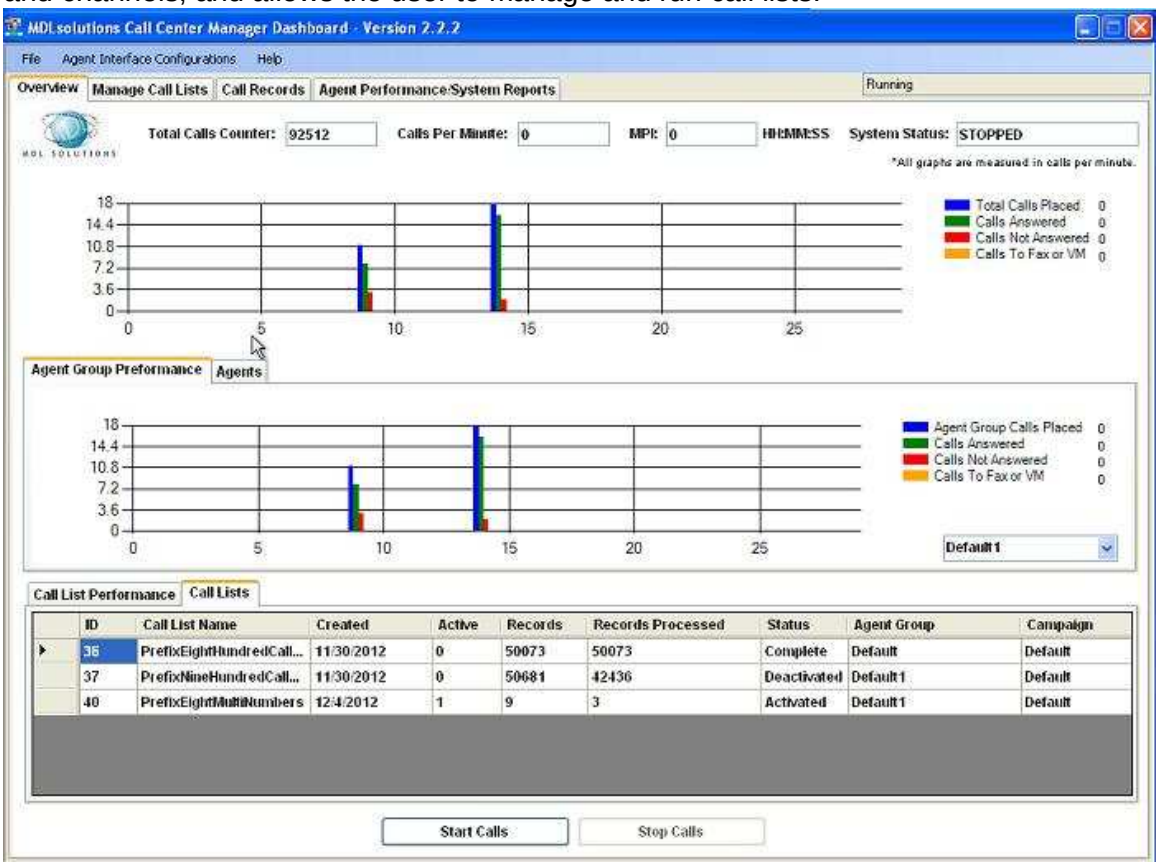

MDLsolutions 3CX Predictive Dialer-CRM Network Plug-in Version 1.23 ( Production Version for 3CX Version 10 CCE )
Transactions
3CX Extension length is set to: [3]
12/1/2011 3:21:28 PM - Listening on port:6002
Running
Extended error information:
Enable transactions (for debugging only)
Close
Clear

**Transactions:** Shows all plug-in transactions, used by MDLsolutions support.
**Extended error information:** Please email any error information you receive in this text box to support@mdlsolutions.com.
**Enable transactions:** For use by MDLsolutions support.
**Close:** If you close this application the Predictive Dialer/Agent Interface will no longer work with 3CX.
**Clear:** Clears the transactions, used by MDLsolutions support.

## *4: Predictive Dialer/Dialer/Call Center Manager Dashboard*
**(Performance graph monitoring/analytics)**

### Overview

The Overview is used to monitor the call center real time, it displays the agents, call lists and channels, and allows the user to manage and run call lists.




**Performance Graphs:**
All performance graphs are broken down as follows:
Blue = Total calls placed.
Green = Calls answered.
Red = Calls not answered.
Yellow = Calls answered by a fax machine or by an answering machine/voice mail.
*First Graph:* Total calls placed in all call lists.
*Second Graph - Agent Group Performance:* Total calls placed for the selected agent group.
*Third Graph - Call List Performance:* Total calls placed in the selected call list.

**Calls Per Minute:** No longer used. Refer to performance graph.
**MPI:** No longer used.
**System Status:** The system status RUNNING, STOPPED and COMPLETING.

Header:
**Total Call Counter:** Total calls placed in all call lists.
**Calls Per Minute:** No longer used. Refer to performance graph.
**MPI:** No longer used.
**System Status:** The system status RUNNING, STOPPED and COMPLETING.

Agents:
**MACAddress:** MAC Address of the computer that the Agent Interface is installed on.
**IPAddress:** IP Address of the computer that the Agent Interface is installed on.
**Extension:** Extension of the agent.
**Agent Status:** If the agent is ready to receive calls or is on a call.
**Last Status Update:** The last time the agent clicked on “Ready to receive calls”.

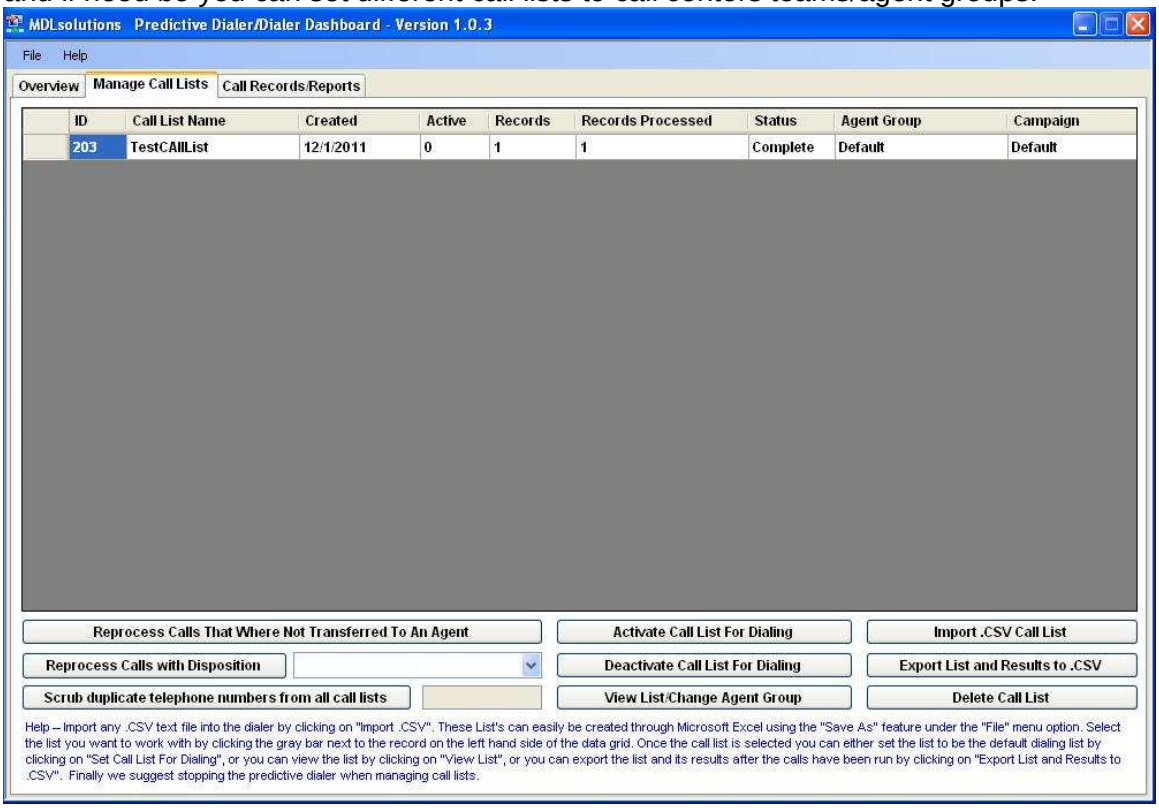
Call Lists:
**ID:** Record id.
**Call List Name:** Name of the call list.
**Created:** Date the list was imported.
**Active:** If the list is activated for dialing.
**Records:** The number of records in the call list.
**Records Processed:** The number of records processed in the call list.
**Status:** If the list is active, deactivated or complete.
**Agent Group:** The agent group/call center team that the call will be transferred to for this call list.
**Campaign:** The campaign associated with the call list.

Channel Status:
**Channel ID:** Numeric id of channel.
**Record ID:** The database record “ID” that is being processed.
**Number:** The telephone number being dialed by the Dialed/Predictive Dialer.
**Enquiries:** Reserved.
**Call Status:** The current status of the call, for example connected, transferred, disconnected and idle.
**Action Info:** The user inputted action/keyword text info that relates to the actual action being processed.

**Start Calls:** Starts placing calls.
**Stop Calls:** Stops calls being placed, user needs to wait until all calls stop normally, after clicking this button.

## Call Lists

The Call Lists tab is used to upload and manage your imported call lists. Currently only comma delimited text files can be imported. Multiple call lists can be run simultaneously and if need be you can set different call lists to call centers teams/agent groups.


MDLsolutions Predictive Dialer/Dialer Dashboard - Version 1.0.3
File
Help
Overview
Manage Call Lists
Call Records/Reports
ID
Call List Name
Created
Active
Records
Records Processed
Status
Agent Group
Campaign
203
TestCallList
12/1/2011
0
1
1
Complete
Default
Default
Reprocess Calls That Where Not Transferred To An Agent
Activate Call List For Dialing
Import .CSV Call List
Reprocess Calls with Disposition
Deactivate Call List For Dialing
Export List and Results to .CSV
Scrub duplicate telephone numbers from all call lists
View List/Change Agent Group
Delete Call List
Help – Import any .CSV text file into the dialer by clicking on "Import .CSV". These List's can easily be created through Microsoft Excel using the "Save As" feature under the "File" menu option. Select the list you want to work with by clicking the gray bar next to the record on the left hand side of the data grid. Once the call list is selected you can either set the list to be the default dialing list by clicking on "Set Call List For Dialing", or you can view the list by clicking on "View List", or you can export the list and its results after the calls have been run by clicking on "Export List and Results to .CSV". Finally we suggest stopping the predictive dialer when managing call lists.

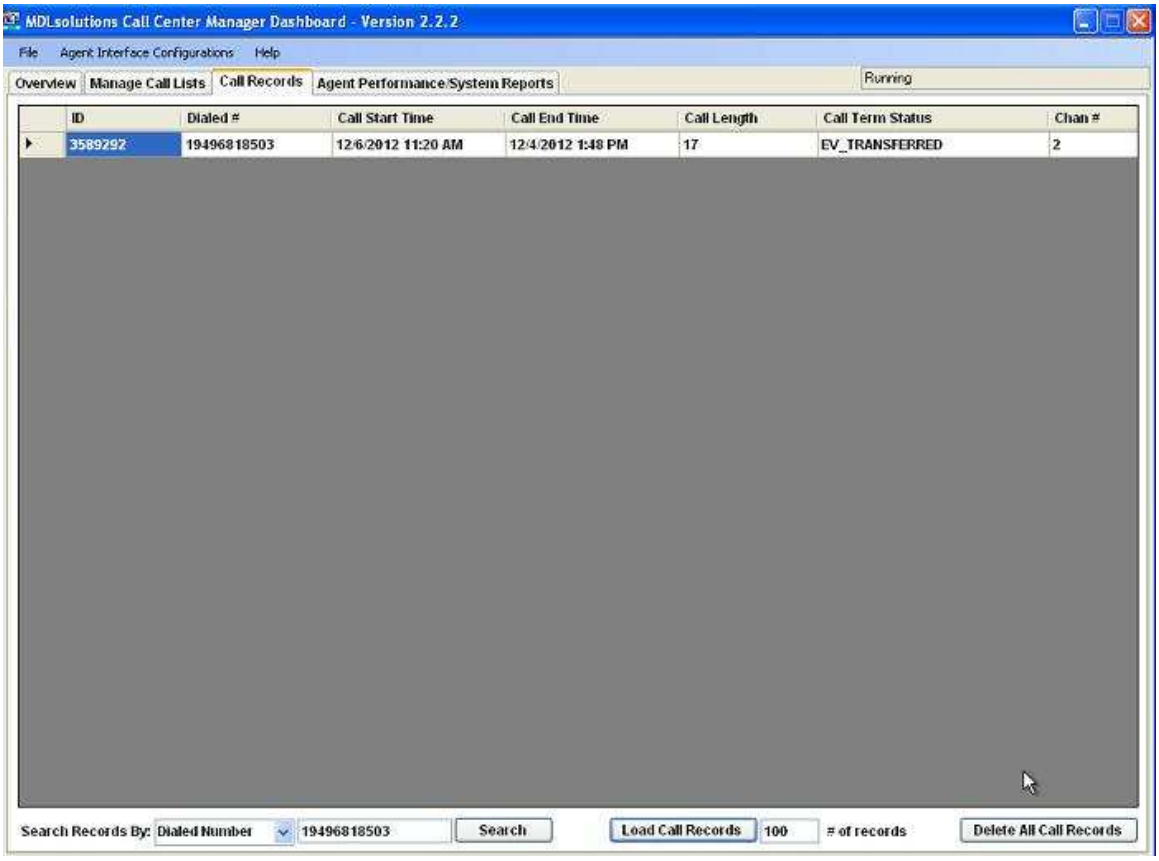
**Reprocess Calls That Where Not Transferred To An Agent:** Reprocess all calls that where not transferred to an agent.
**Reprocess Calls with Disposition:** Reprocess calls that have a certain disposition.
**Scrub duplicate telephone numbers from all call lists:** Scrubs duplicate telephone numbers from all call lists.
**Activate Call Lists For Dialing:** Activate the selected call list for dialing.
**Deactivate Call Lists For Dialing:** Deactivate the selected current call list so it is no longer dialed.
**View List/Change Agent Group:** View the selected call list details and if need be change the “Agent Group/Call Center Team” for the call list.
**Import .CSV Call List:** Import comma delimited text file.
**Export List and Results to .CSV:** Export a summary of the call list and results to .CSV file.
**Delete Call List:** Delete selected call list.

**CALL LIST GRID**

“ID”= Record id.
“Call List Name”= Name of the call list.
“Created”= Date the list was imported.
“Active”= If the list is activated for dialing.
“Records”= The number of records in the call list.
“Records Processed”= The number of records processed in the call list.
“Status”= If the list is active, deactivated or complete.
“Agent Group”= The agent group/call center team that the call will be transferred to for this call list.
“Campaign”= The campaign associated with the call list.

## Call Records

The Call Records/Reports tab displays all the calls that have been made by the Predictive Dialer.

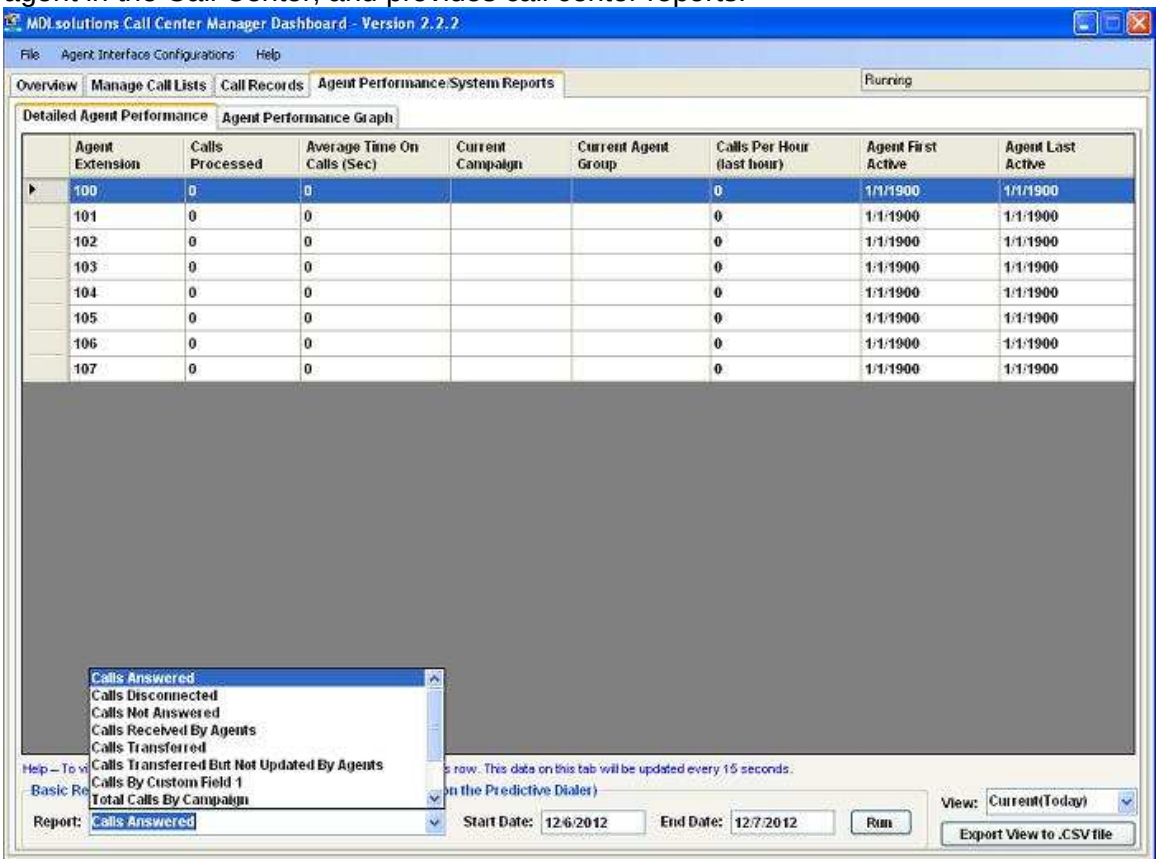



**Load Call Records:** Input the amount of call records you want displayed, and then click on Load Call Records.
**Delete All Call Records:** Completely deletes all call records. Call records are automatically deleted after 7 days, but this can be changed in the dialer config file.
**Search Records By:** Allows you to search call records by “Dialed Number”, “Call Term Status” and “Custom Field 1”.

**Call Record Grid:**
ID: Record id.
Dialed #: Number that is dialed.
Call Start Time: The time the call started.
Call End Time: The time the call ended.
Call Length: The length of the call in seconds. This will be set if the Agent uses the Agent Interface.
Call Term Status: What was the status of the call, idle (no answer/disconnected) or transferred (to an agent).
Chan #: The Predictive Dialer channel the call is placed on.
# Of Enquiries: Reserved.

## Agent Performance Overview/Call Center Reports

The Agent Performance Overview tab displays important real-time information about the agent in the Call Center, and provides call center reports.




**View:** Allows the manager/supervisor to view the current real-time call center agent information, as well as up to 7 days in the past.
**Agent Performance Graph:** Allows the manager/supervisor to view the current real-time per agent call performance graph.
**Export View to .CSV file:** Any View can be exported to a .CSV file for further examination/processing.

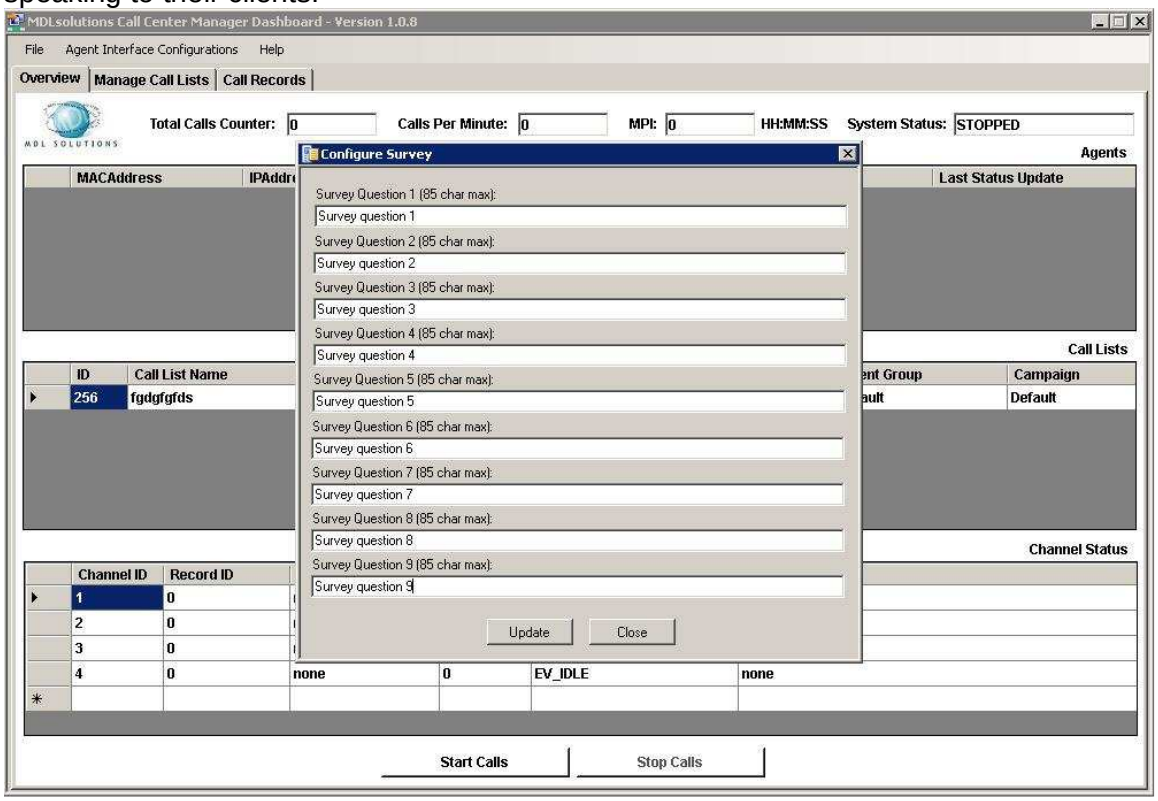
**Agent Performance Grid:**
Agent Extension: The extension number of the current agent.
Current Agent Status: If the agent is ready to receive calls or is on a call.
Calls Received: The total calls received for the day.
Average Time On Calls: The average time (in seconds) the agent has spent on all the calls he received for the day.
Current Campaign: The campaign the agent is working on/receiving calls from.
Current Agent Group: The Agent Group the agent is assigned to/part of.
Calls Per Hour: The amount calls the agent received in the last hour.
Agent First Active: When the agent received his first call for the day.
Agent Last Active: When the agent received his last call for the day.

**Reports:**
Reports: Simply select a report from the options displayed in the drop down box. Then set the start date and end date of the calls/data you want in your report, then click “Run”.

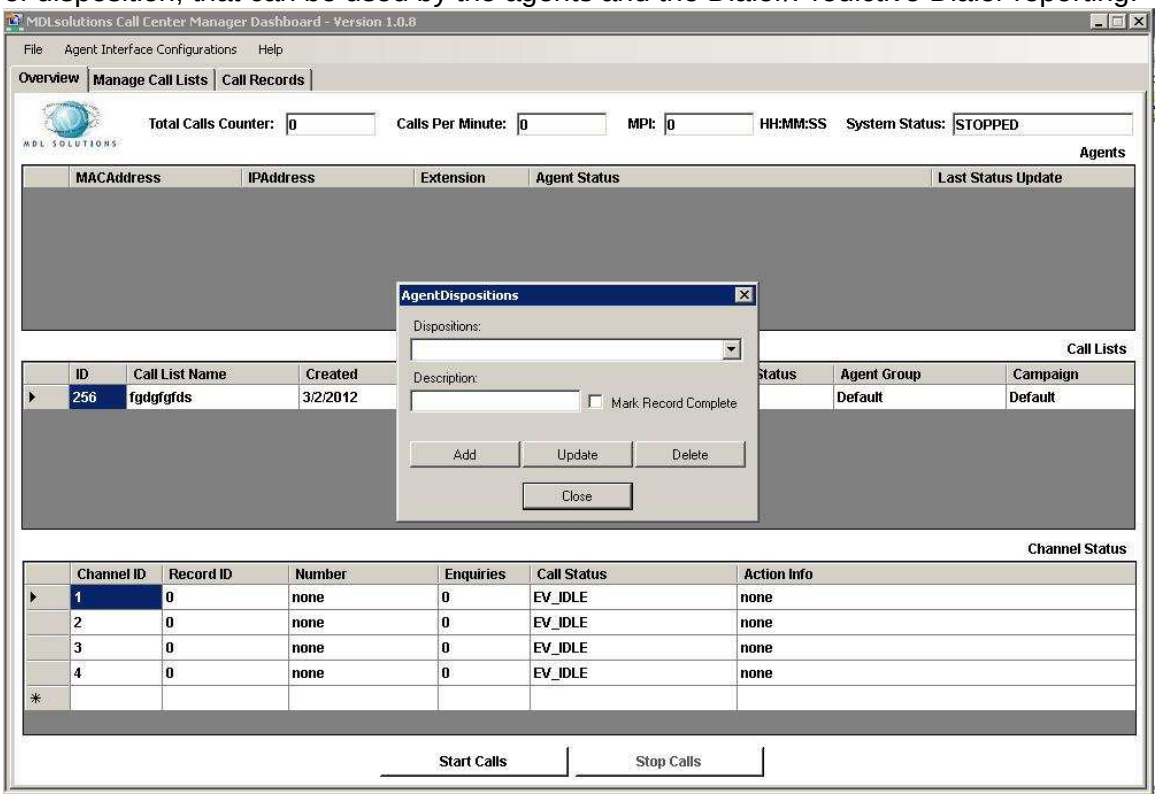
## Dashboard Menu Options

**File:**
Configuration: Allows the user to determine which Predictive Dialer Database he wants to connect to.
Exit: Close this application.

**Agent Interface Configurations:**
Configure Survey Questions: Allows the call center manager/supervisor to setup a unique set of questions, in order to create a survey that the agents can use when speaking to their clients.



Configure Dispositions: Allows the call center manager/supervisor to setup a unique set of disposition, that can be used by the agents and the Dialer/Predictive Dialer reporting.

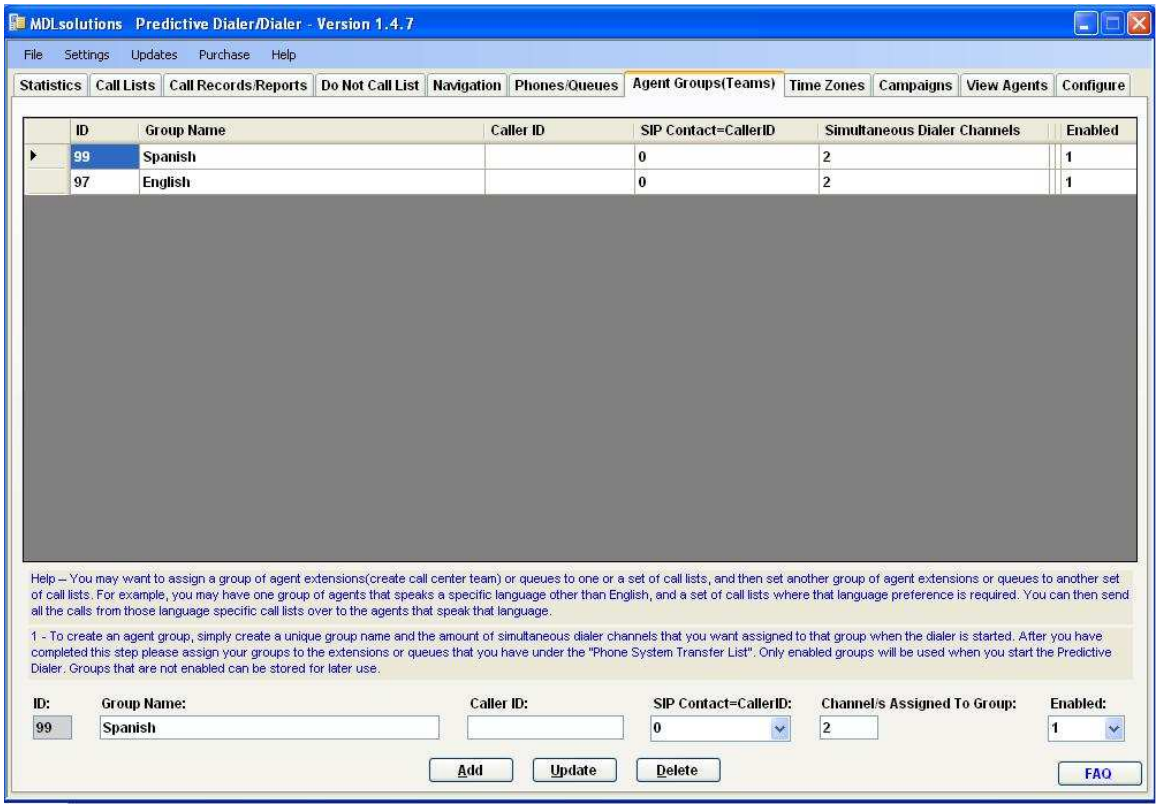



**Help:**
Online help resources

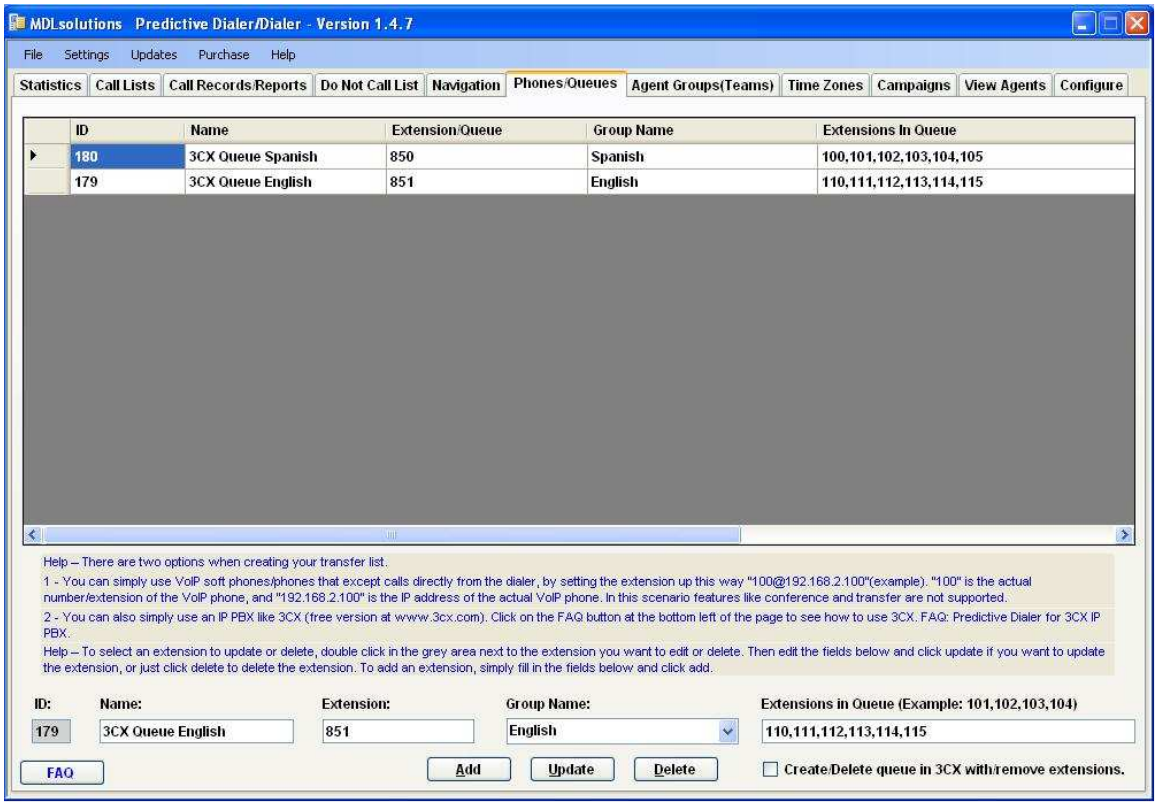
# *5: Configuration Tips*

## Configuring Agent Groups/Call Center Team

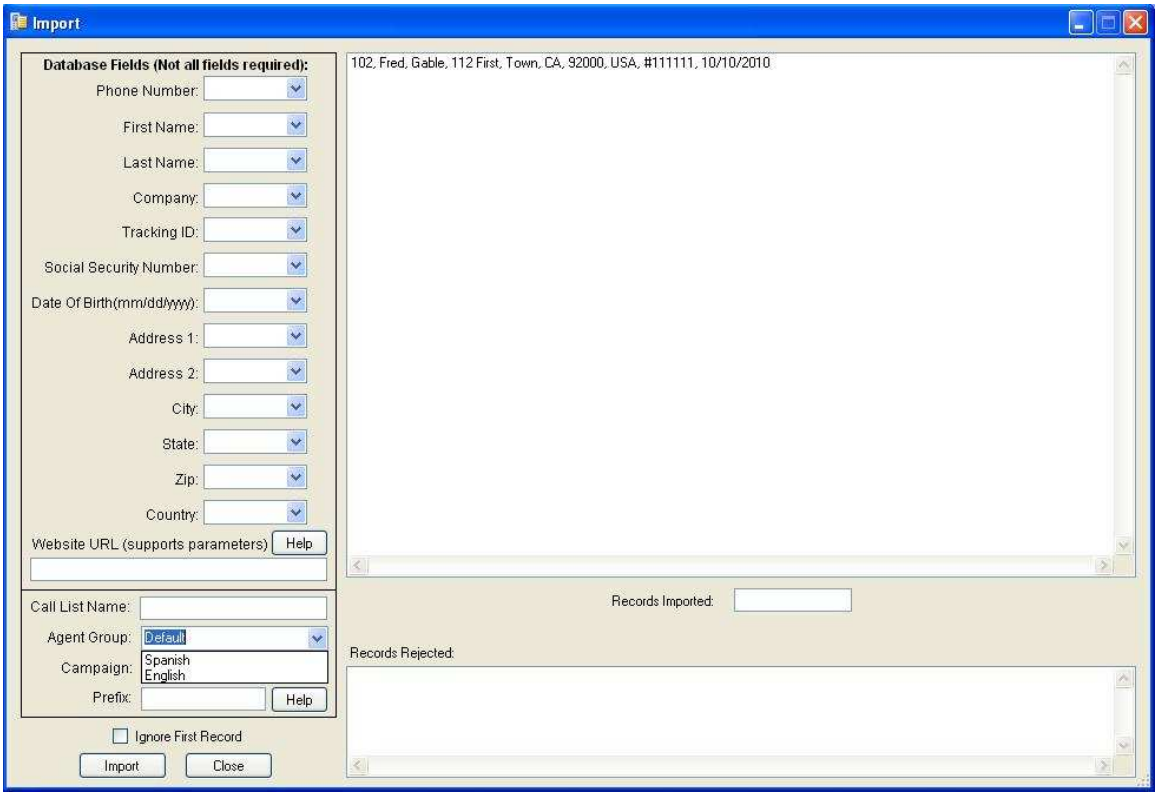
Start off by creating an Agent Group and assigning channels to it that will be used to make the calls for that Agent Group. Your total assigned channels must not exceed the amount of licensed channels that where purchased. The trial version includes 4 channels.


MDLsolutions Predictive Dialer/Dialer - Version 1.4.7
File
Settings
Updates
Purchase
Help
Statistics
Call Lists
Call Records/Reports
Do Not Call List
Navigation
Phones/Queues
Agent Groups(Teams)
Time Zones
Campaigns
View Agents
Configure
ID
Group Name
Caller ID
SIP Contact=CallerID
Simultaneous Dialer Channels
Enabled
99
Spanish
0
2
1
97
English
0
2
1
Help -- You may want to assign a group of agent extensions(create call center team) or queues to one or a set of call lists, and then set another group of agent extensions or queues to another set of call lists. For example, you may have one group of agents that speaks a specific language other than English, and a set of call lists where that language preference is required. You can then send all the calls from those language specific call lists over to the agents that speak that language.
1 - To create an agent group, simply create a unique group name and the amount of simultaneous dialer channels that you want assigned to that group when the dialer is started. After you have completed this step please assign your groups to the extensions or queues that you have under the "Phone System Transfer List". Only enabled groups will be used when you start the Predictive Dialer. Groups that are not enabled can be stored for later use.
ID:
Group Name:
Caller ID:
SIP Contact=CallerID:
Channel/s Assigned To Group:
Enabled:
99
Spanish
0
2
1
Add
Update
Delete
FAQ

Now create 3CX queues using the Agent Groups you created above, and assign your extensions for that Agent Group/Call Center team. Note: The 3CX queues that you create in this Predictive Dialer tab will be automatically created in 3CX for you, by the Predictive Dialer.


MDLsolutions Predictive Dialer/Dialer - Version 1.4.7
File Settings Updates Purchase Help
Statistics Call Lists Call Records/Reports Do Not Call List Navigation Phones/Queues Agent Groups(Teams) Time Zones Campaigns View Agents Configure
ID Name Extension/Queue Group Name Extensions In Queue
180 3CX Queue Spanish 850 Spanish 100,101,102,103,104,105
179 3CX Queue English 851 English 110,111,112,113,114,115
Help – There are two options when creating your transfer list.
1 - You can simply use VoIP soft phones/phones that except calls directly from the dialer, by setting the extension up this way "100@192.168.2.100"(example). "100" is the actual number/extension of the VoIP phone, and "192.168.2.100" is the IP address of the actual VoIP phone. In this scenario features like conference and transfer are not supported.
2 - You can also simply use an IP PBX like 3CX (free version at www.3cx.com). Click on the FAQ button at the bottom left of the page to see how to use 3CX. FAQ: Predictive Dialer for 3CX IP PBX.
Help – To select an extension to update or delete, double click in the grey area next to the extension you want to edit or delete. Then edit the fields below and click update if you want to update the extension, or just click delete to delete the extension. To add an extension, simply fill in the fields below and click add.
ID: Name: Extension: Group Name: Extensions in Queue (Example: 101,102,103,104)
179 3CX Queue English 851 English 110,111,112,113,114,115
FAQ Add Update Delete Create/Delete queue in 3CX with/remove extensions.

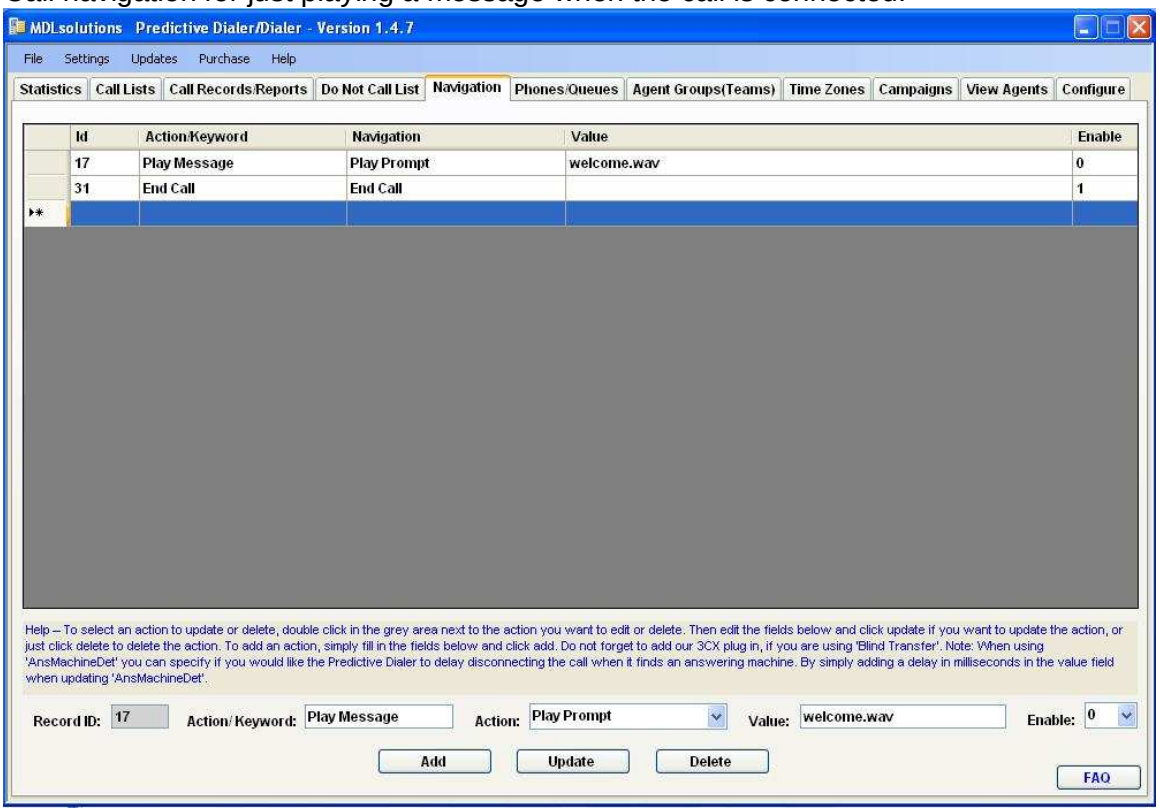
When importing your call list, make sure you select the correct Agent Group, for your call list.



## Configuring Call Navigation (Call Flow)

Call navigation can be combined to run many different types of call actions, before running a custom set of call actions, please test them using your mobile/test phone, to make sure the action set works correctly and there are no error's.

Call navigation for just playing a message when the call is connected.


MDLsolutions Predictive Dialer/Dialer - Version 1.4.7
File
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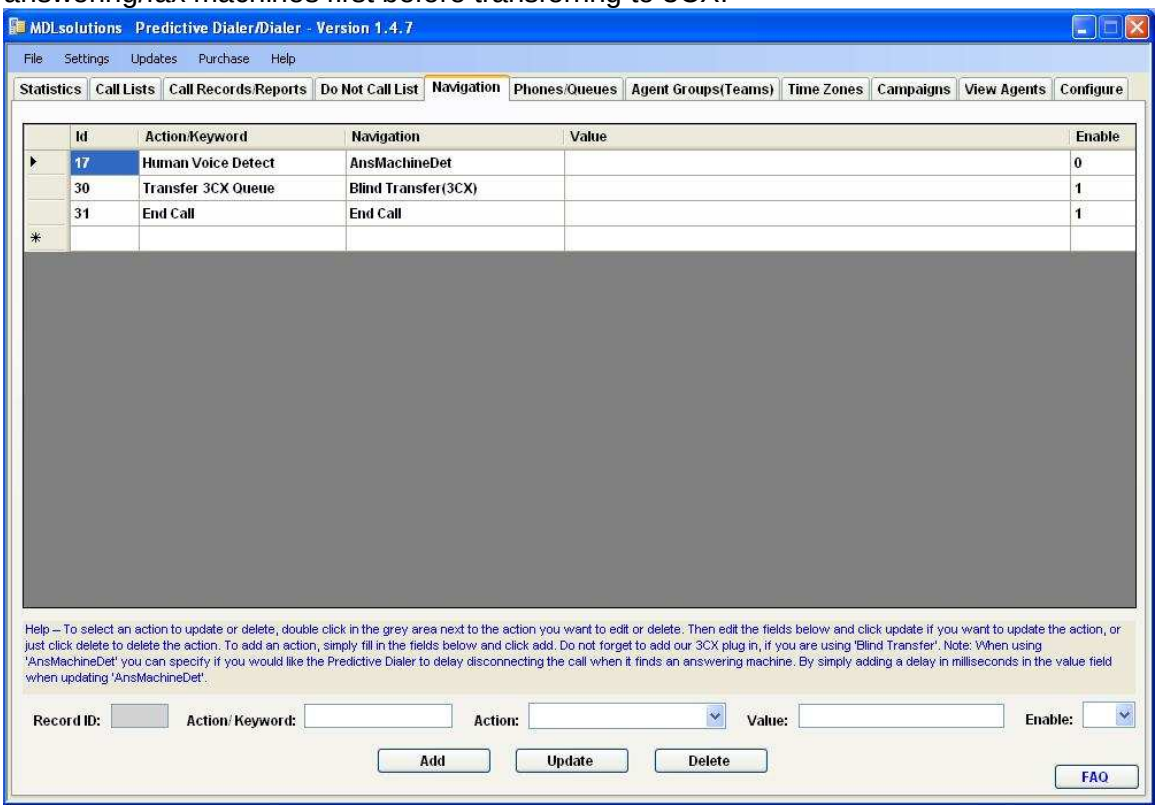
Updates
Purchase
Help
Statistics
Call Lists
Call Records/Reports
Do Not Call List
Navigation
Phones/Queues
Agent Groups(Teams)
Time Zones
Campaigns
View Agents
Configure
Id
Action/Keyword
Navigation
Value
Enable
17
Play Message
Play Prompt
welcome.wav
0
31
End Call
End Call
1
Help -- To select an action to update or delete, double click in the grey area next to the action you want to edit or delete. Then edit the fields below and click update if you want to update the action, or just click delete to delete the action. To add an action, simply fill in the fields below and click add. Do not forget to add our 3CX plug in, if you are using 'Blind Transfer'. Note: When using 'AnsMachineDet' you can specify if you would like the Predictive Dialer to delay disconnecting the call when it finds an answering machine. By simply adding a delay in milliseconds in the value field when updating 'AnsMachineDet'.
Record ID:
17
Action/ Keyword:
Play Message
Action:
Play Prompt
Value:
welcome.wav
Enable:
0
Add
Update
Delete
FAQ

Call navigation for checking for an answering machine/faxmachine first and then transferring a connected call to 3cx. In this example it shows you can disable call actions. So make sure your “AnsMachineDet” is enabled if you want to check for answering/fax machines first before transferring to 3CX.


MDLsolutions Predictive Dialer/Dialer - Version 1.4.7
File
Settings
Updates
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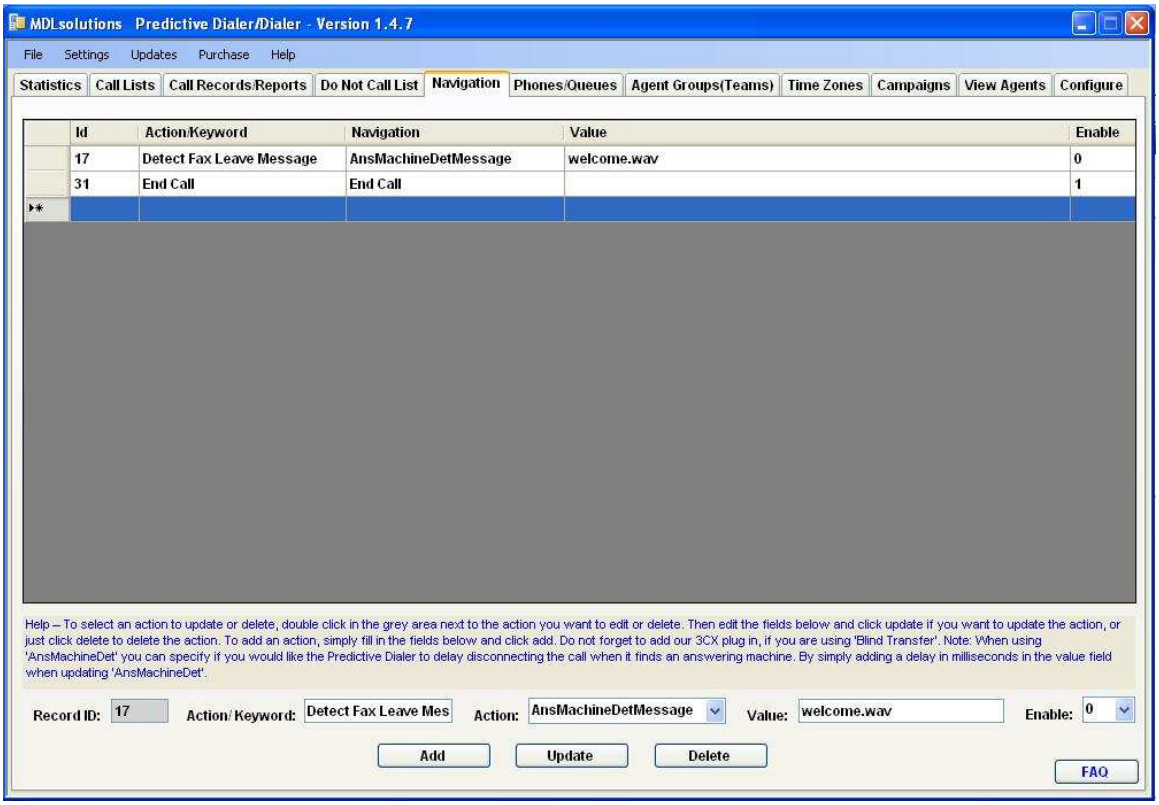
Help
Statistics
Call Lists
Call Records/Reports
Do Not Call List
Navigation
Phones/Queues
Agent Groups(Teams)
Time Zones
Campaigns
View Agents
Configure
Id
Action/Keyword
Navigation
Value
Enable
17
Human Voice Detect
AnsMachineDet
0
30
Transfer 3CX Queue
Blind Transfer(3CX)
1
31
End Call
End Call
1
Help – To select an action to update or delete, double click in the grey area next to the action you want to edit or delete. Then edit the fields below and click update if you want to update the action, or just click delete to delete the action. To add an action, simply fill in the fields below and click add. Do not forget to add our 3CX plug in, if you are using 'Blind Transfer'. Note: When using 'AnsMachineDet' you can specify if you would like the Predictive Dialer to delay disconnecting the call when it finds an answering machine. By simply adding a delay in milliseconds in the value field when updating 'AnsMachineDet'.
Record ID:
Action/ Keyword:
Action:
Value:
Enable:
Add
Update
Delete
FAQ

Call navigation for checking for an answering machine and leaving a message if one is detected after the call is connected.


MDLsolutions Predictive Dialer/Dialer - Version 1.4.7
File
Settings
Updates
Purchase
Help
Statistics
Call Lists
Call Records/Reports
Do Not Call List
Navigation
Phones/Queues
Agent Groups(Teams)
Time Zones
Campaigns
View Agents
Configure
Id
Action/Keyword
Navigation
Value
Enable
17
Detect Fax Leave Message
AnsMachineDetMessage
welcome.wav
0
31
End Call
End Call
1
Help -- To select an action to update or delete, double click in the grey area next to the action you want to edit or delete. Then edit the fields below and click update if you want to update the action, or just click delete to delete the action. To add an action, simply fill in the fields below and click add. Do not forget to add our 3CX plug in, if you are using 'Blind Transfer'. Note: When using 'AnsMachineDet' you can specify if you would like the Predictive Dialer to delay disconnecting the call when it finds an answering machine. By simply adding a delay in milliseconds in the value field when updating 'AnsMachineDet'.
Record ID:
17
Action/ Keyword:
Detect Fax Leave Mes
Action:
AnsMachineDetMessage
Value:
welcome.wav
Enable:
0
Add
Update
Delete
FAQ

## Loading the Predictive Dialer/Increasing Call Rates (Try Predictive Dialing Algorithms first on the “Configuration” tab, before changing the loading values.)

In the Predictive Dialer configuration file, in the application directory (C:\MDLsolutions\MDLsolutions Dialer - Predictive Dialer\Dialer.exe.config) you will find one setting that is not included in the standard configuration interface. It is called PredictiveDialerLoad (<add key="PredictiveDialerLoad" value="0" />), as seen below.

```
<appSettings>
  <add key="SQLConnectionString" value="Server=192.168.2.96\SQLEXPRESS;Initial Catalo
  <add key="SQLConnectionStringAISRecords" value="Server=192.168.2.96\SQLEXPRESS;Init
  <add key="LocalIP" value="localhost" />
  <add key="3CXController" value="192.168.2.72" />
  <add key="EmailServer" value="localhost" />
  <add key="FromEmailAddress" value="mail.localhost" />
  <add key="ToEmailAddress1" value="admin@localhost" />
  <add key="ToEmailAddress2" value="info@localhost" />
  <add key="Username" value="admin" />
  <add key="Password" value="pass" />
  <add key="TotalChannels" value="2" />
  <add key="FailedCallRecognitionNotificationCounter" value="3" />
  <add key="TransferedToAnAttendantCounter" value="4" />
  <add key="MultiNavDelay" value="3" />
  <add key="DebugMode" value="0" />
  <add key="CallRecording" value="0" />
  <add key="ASRSampleSizeInSeconds" value="11" />
  <add key="InterEnquiryDelayMax" value="1" />
  <add key="ASRModeOn" value="0" />
  <add key="ManagedAgentCalls" value="false" />
  <add key="PredictiveDialerLoad" value="0" />
  <add key="DialerModeOnly" value="false" />
  <add key="TimeZoneDialRange" value="9:6" />
  <add key="TTSVoice" value="Name=Microsoft Mary" />
  <add key="TTSRate" value="1" />
  <add key="PDAlgCallIntervalStartDelay" value="10" />
</appSettings>
```

By default, the Predictive Dialer is setup to make sure there is an agent available for every call, and no calls are left in the 3CX queue. But some call lists have a lot of numbers that are either invalid, fax machines, answering machines or people who do not accept call center calls. In this case you may need to place a lot of calls at once in order to get one or two calls a minute per agent. If this is the case you can simply increase the “PredictiveDialerLoad” value until this call rate is reached. With this said, you may get from time to time a called client waiting in the 3CX queue. So please make sure you have a message playing for the 3CX queue that explain why this person was called and to please hold on for the next available agent.

Finally the “PredictiveDialerLoad” cannot be higher than the total amount of channels your Predictive Dialer is licensed for.

## Text to Speech (TTS) settings

If you want to change the sound of the TTS voice or the speed at which it speaks, then you can adjust the TTSVoice setting and the TTSRate setting. Current voices that are available are Microsoft Mary/Mike/Sam. Please look online for other Microsoft voices, if need be.

```
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  <add key="SQLConnectionStringAISRecords" value="Server=192.168.2.96\SQLEXPRESS;Init
  <add key="LocalIP" value="localhost" />
  <add key="3CXController" value="192.168.2.72" />
  <add key="EmailServer" value="localhost" />
  <add key="FromEmailAddress" value="mail.localhost" />
  <add key="ToEmailAddress1" value="admin@localhost" />
  <add key="ToEmailAddress2" value="info@localhost" />
  <add key="Username" value="admin" />
  <add key="Password" value="pass" />
  <add key="TotalChannels" value="2" />
  <add key="FailedCallRecognitionNotificationCounter" value="3" />
  <add key="TransferedToAnAttendantCounter" value="4" />
  <add key="MultiNavDelay" value="3" />
  <add key="DebugMode" value="0" />
  <add key="CallRecording" value="0" />
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  <add key="ASRModeOn" value="0" />
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  <add key="TTSVoice" value="Name=Microsoft Mary" />
  <add key="TTSRate" value="1" />
  <add key="PDAlgCallIntervalStartDelay" value="10" />
</appSettings>
```